NORTH AMERICA HEALTHCARE CLOUD COMPUTING MARKET

– [By Applications (EMR, PACS, RIS, RCM, APB), By Deployment (Private, Public, Hybrid), By Service (SaaS, IaaS), By Pricing (Pay-As-You-Go, Spot), By End Users (Provider, Payers)]

– Forecast to 2018

Report Description
Table of Contents
List of Tables
Sample Tables
Related Reports

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1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

- To define and measure the North American market for cloud computing in healthcare, based on applications, deployment modes, service models, components, pricing models, end users, and geography
- To identify the key micro-markets and their drivers within the North American healthcare cloud market, which are expected to show impressive growth in the coming years
- To strategically analyze the market in terms of applications, services, and geography
- To identify market trends, gaps, and opportunities for all the stakeholders
- To strategically analyze the market structure and profile in detail all the key players in the micro-markets of the North American healthcare cloud computing market
- To track and analyze competitive developments such as alliances, joint ventures, mergers and acquisitions, client acquisitions, new product developments, and research and developments

1.2 REPORT DESCRIPTION

The healthcare industry has a plethora of information in the form of patient records, medical images, patient bills, prescriptions, insurance claims, and research data. The task for providers and other healthcare organizations is not only to store this data but also to process and maintain this data by using IT technology and make it available on-demand and across boundaries. For the healthcare industry, cloud computing as a technology has four offerings in the form of computation, storage, memory, and networking. Cloud computing is increasingly being adopted in the healthcare industry, owing to the increasing pressure to curtail healthcare costs, while maintaining the quality of care provided to patients.

The major factors driving this market are the legislative reform of the Patient Protection and Affordable Care Act (PPACA), the requirement of demonstrating meaningful use, ICD 10 transition, federal mandates on insuring every U.S. citizen, and proliferation of new payment models. Moreover, the benefits provided by cloud computing such as cost reduction, positive returns on investment, improved accessibility and mobility, improvements in storage technology, and greater flexibility and scalability of data are resulting in the increase in deployment of applications on cloud.

The North American Healthcare Cloud Computing Market is segmented on the basis of applications, deployment modes, services, pricing model, components, end users, and geography. The applications market includes clinical and non-clinical information systems applicable for the healthcare providers and payers industry. Clinical information systems are further classified into EMR, PACS, CPOE, RIS, LIS, PIS, and Others. Non clinical information systems include revenue cycle management, automatic patient billing, payroll, claims management, cost accounting, and others.

The market by deployment model is segmented into private, public, and hybrid clouds. The services market in cloud computing comprises software-as-a-service (SaaS), infrastructure-as-a-service (IaaS), and platform-as-a-service (PaaS). The pricing model market includes two majorly adopted models which are Pay-As-You-Go and Spot Pricing. The cloud computing market, by component, includes software, hardware, and services. The North American Healthcare Cloud Computing market by end user is categorized into healthcare payers and providers. Based on geography, the market is divided into the U.S. and Canada.

The major players in the North American Healthcare Cloud Computing Market include athenahealth, Inc., CareCloud Corporation, Carestream Health, Inc., ClearData Networks, Inc., Cisco Systems, Inc., Dell, Inc., EMC Corporation, Global Net Access (GNAX) Health, Hewlett-Packard Company, IBM Corporation, Iron Mountain, Inc., Merge Healthcare, Inc., Microsoft Corporation, Oracle Corporation, and VMware, Inc.

1.3 MARKETS COVERED

North American healthcare cloud computing market, by application

- Clinical Information Systems (CIS)
  - Electronic Medical Records (EMR)
  - Picture Archiving and Communication System (PACS)
  - Radiology Information System (RIS)
  - Computerized Physician Order Entry (CPOE)
  - Laboratory Information System (LIS)
  - Pharmacy Information System (PIS)
  - Others
- Non Clinical Information Systems (NCIS)
  - Revenue Cycle Management (RCM)
  - Automatic Patient Billing (APB)
  - Cost Accounting
  - Payroll
  - Claims Management
  - Others

North American healthcare cloud computing market, by pricing model

- Pay-as-you-go
- Spot Pricing

North American healthcare cloud computing market, by deployment model

- Public Cloud
- Private Cloud
- Hybrid Cloud

North American healthcare cloud computing market, by component

- Software
- Hardware
- Services

North American healthcare cloud computing market, by service model

- Software-as-a-Service (SaaS)
- Platform-as-a-Service (PaaS)
- Infrastructure-as-a-Service (IaaS)

North American healthcare cloud computing market, by service model

- Providers
- Payers

North American healthcare cloud computing market, by geography

- U.S.
- Canada

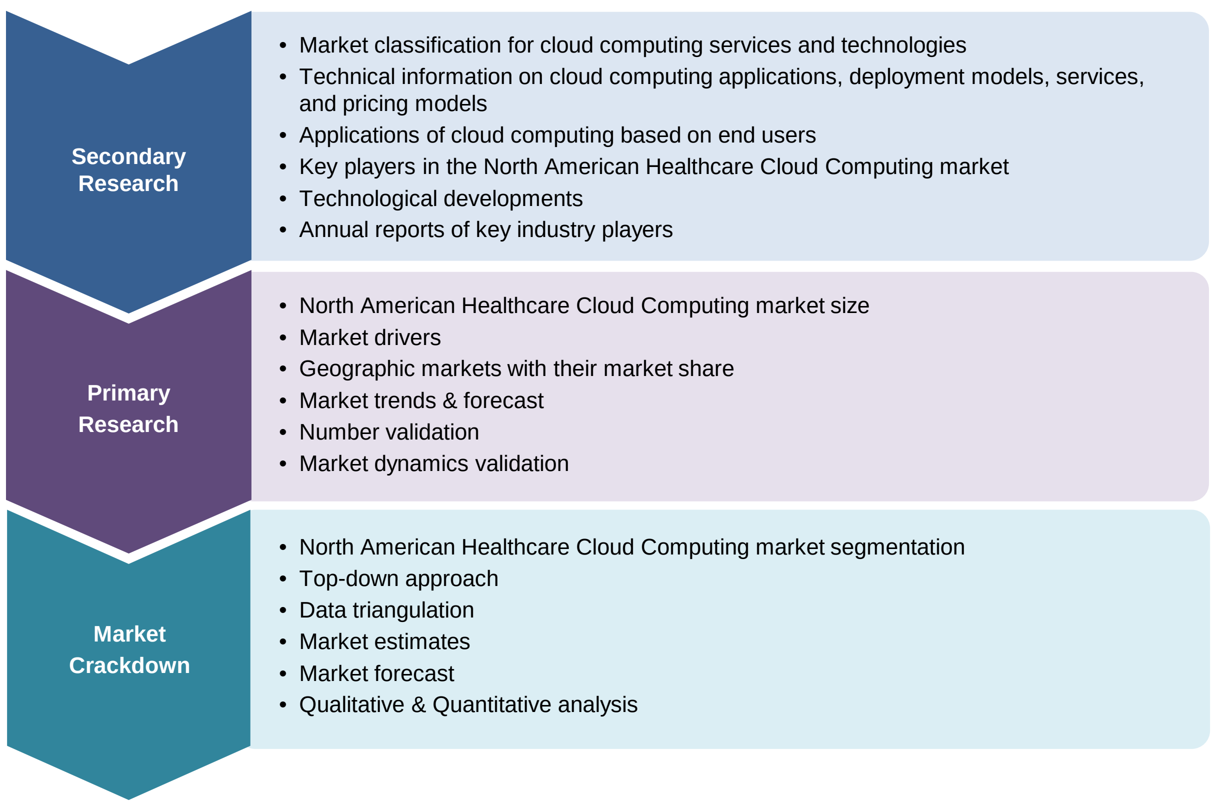
1.4 STAKEHOLDERS

- Healthcare IT Service Providers
- Healthcare Insurance Companies/Payers
- Healthcare Institutions/Providers (Hospitals, Medical Groups, Physician Practices, Diagnostic Centers, and Outpatient Clinics)
- Research and Development (R&D) companies
- Business research and consulting service providers
- Medical research laboratories
- Research and Consulting Firms
- Venture Capitalists
- Government Agencies
- Life Science Companies
- Health Information Exchanges
- Accountable Care Organizations

1.5 RESEARCH METHODOLOGY

FIGURE 1

RESEARCH METHODOLOGY STEPS



Source: MarketsandMarkets Analysis

1.5.1 SECONDARY AND PRIMARY RESEARCH METHODOLOGY

1.5.1.1 Secondary Research

Secondary sources were used to identify and collect information useful for this extensive technical and commercial study of the North American Healthcare Cloud Computing market.

The following non-exclusive list of secondary sources was referred to:

Associations / Organizations / Institutes:
Cloud Computing Association (CCA), Healthcare Information and Management Systems Society (HIMSS), American Health Information Management Association (AHIMA), American Medical Informatics Association (AMIA), California Association of Public Hospitals and Health Systems (CAPH), Federally Qualified Health Centers (FQHCs), General Physician Hospital Organization (GPHO), The Cloud Computing Association (CCA), The Institute of Electrical and Electronics Engineers (IEEE) Computer Society, Certification Commission for Health Information Technology (CCHIT), Information Technology Association of Canada (ITAC), American Medical Informatics Association (AMIA), American Statistical Association, and Canadian Health Care Anti-fraud Association (CHCAA), among others

- **Key Players:** Annual Reports/SEC Filings, Investor Presentations, Press Releases
- **Other Sources:** White Papers, Journals/Magazines, and News Articles, among others
- **Paid Databases:** Factiva, Thomson Reuters, Hoovers, and others

This information was used to gauge the technical, market-oriented, and commercial aspects of the North American Healthcare Cloud Computing market.

The secondary research involved three major activities, including:

Background Study

- To build a basic understanding of cloud computing applications and services
- MarketsandMarkets data repository analysis, followed by drawing and updating data tables by using current information

- Identifying data gaps and key players in each of the segments

Market Understanding

- Identifying stakeholders and key decision makers in different geographies
- Selection criteria of key decision makers
- Analyzing competitive landscape
  - Major players with their product portfolios
  - Strategies adopted by players to position their products
- Geographic market analysis

Trends

- Identifying and analyzing the key products, services, and trends to draw notes and include the consideration in the final forecasts
- Major drivers, barriers, and opportunities prevailing in the market

1.5.1.2 Primary Research

Industry experts such as CEOs, presidents, vice presidents, directors, marketing directors, marketing managers, and related key executives from various key companies and organizations in the healthcare cloud computing industry were interviewed, to obtain and verify both qualitative and quantitative aspects of this research study.

- A robust primary research methodology has been adopted to validate the contents of the report and to fill in the gaps
- A telephonic and e-mail communication mode was adopted to conduct interviews (questionnaires were designed and sent to primary participants as per their convenience)

FIGURE 2

SAMPLING FRAME: PRIMARY RESEARCH

Key Opinion Leaders		U.S.	Canada	Total
Presidents, CEOs, Vice Presidents, Directors, Senior Managers	Supply Side	XX	XX	XX
Product/Sales/Marketing/Business Development/HCIS Service Delivery/Project Managers or Specialists, Business Intelligence Consultants		XX	XX	XX
Healthcare providers (Hospitals, Medical Groups, Physician Practices, Diagnostic Centers, and Outpatient Clinics)	Demand Side	XX	XX	XX
Healthcare payers (Health Insurance Companies)		XX	XX	XX
Total		XX	XX	XX

Source: MarketsandMarkets Analysis

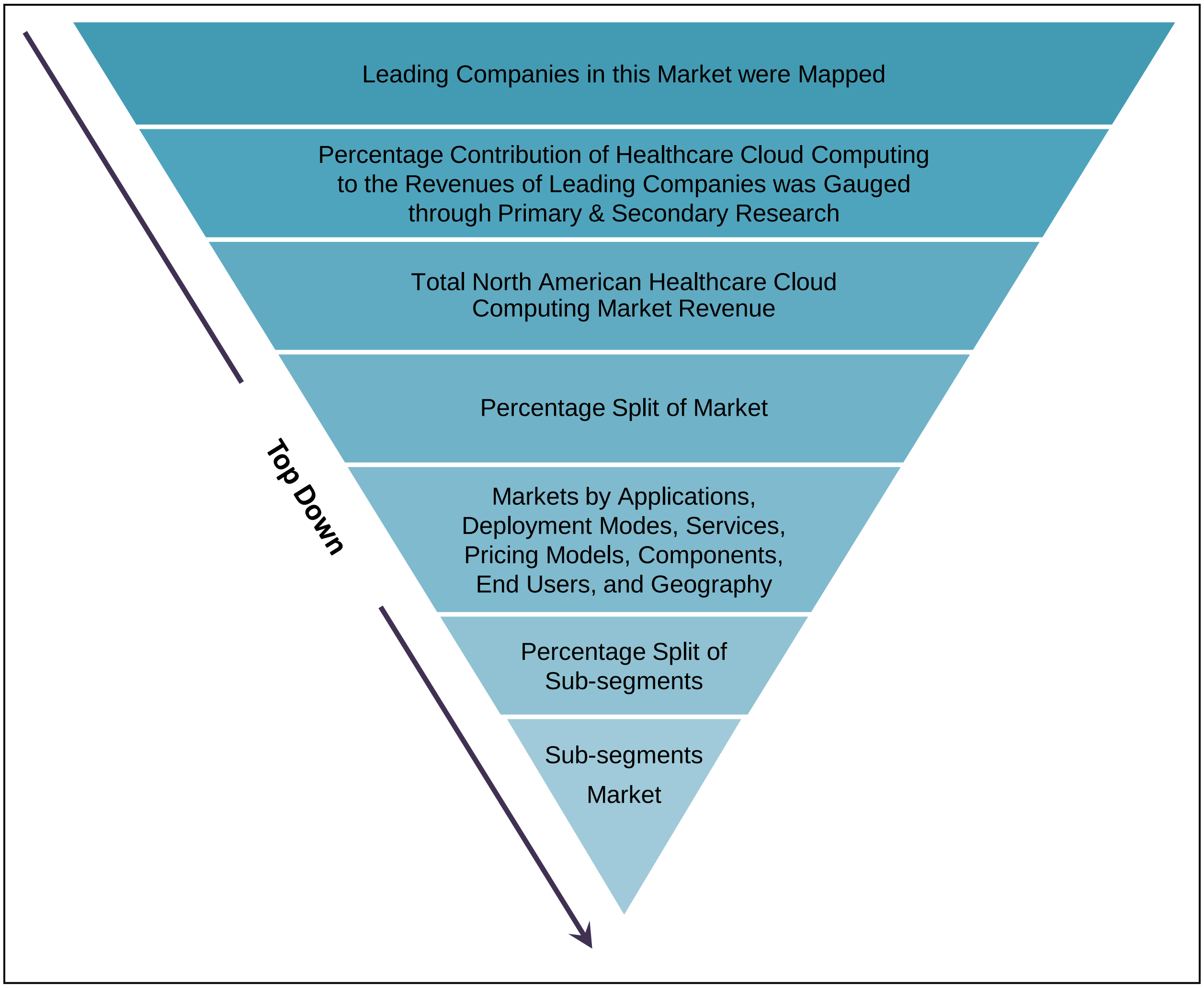
1.5.2 MARKET SIZE ESTIMATION

A top-down approach was used to arrive at the North American Healthcare Cloud Computing market size. A bottom-up approach was not feasible for this research study. This market is highly fragmented and healthcare cloud computing revenue for each sub-segment was difficult to obtain. Most of the companies in this market are privately owned and do not disclose their revenues in the public domain. Other big giants such as IBM, Oracle, and Microsoft do not provide their revenues from the healthcare cloud computing market in their annual reports. Thus, extensive primary research was done to derive the healthcare cloud computing revenue of market players whose revenue is not available publicly. In addition, primary research in terms of direct competitors of companies along with secondary data (developments, product offerings, investments) was utilized to determine the leading players in this market.

The following figure shows an illustrative representation of the overall market size estimation of the North American Healthcare Cloud Computing Market.

FIGURE 3

MARKET SIZE ESTIMATION METHODOLOGY



Source: MarketsandMarkets Analysis

The total market size was triangulated by calculating the percentage share of healthcare in the global cloud computing market, followed by percentage share of the North American market in the global healthcare cloud computing market.

All the percentage shares, splits, and breakdowns were determined by using secondary sources and verified through primary sources. All the possible parameters that affect the markets covered in this research study have been accounted for, viewed in extensive detail, verified through primary research, and analyzed to get the final quantitative and qualitative data. This data is consolidated and added with detailed inputs and analysis from MarketsandMarkets.

1.5.3 MARKET FORECAST

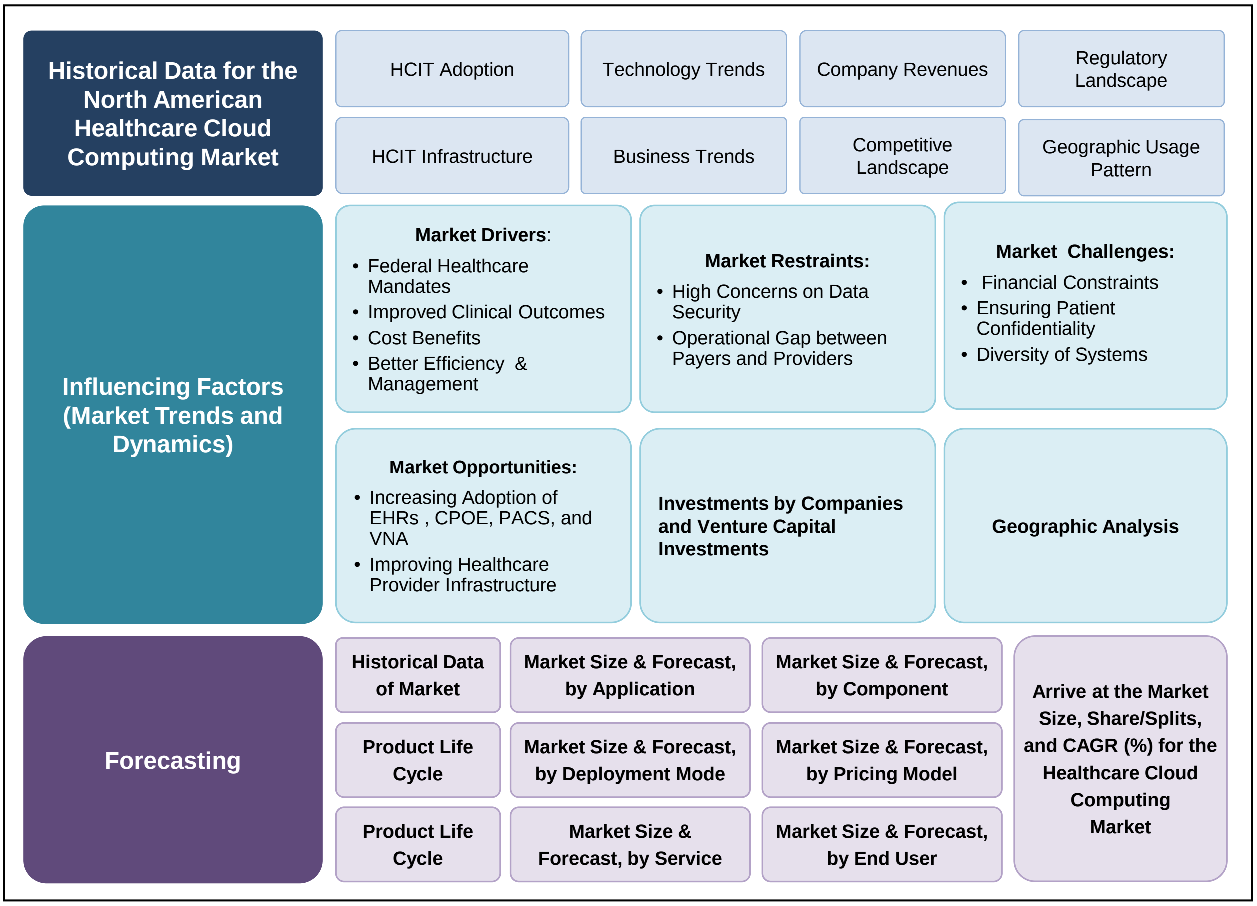
The market forecasts for various segments and sub-segments have been derived on the basis of:

- Federal mandates (HIPAA, HITECH Act, ICD 10 conversion, Meaningful Use)
- Healthcare infrastructure and trends
- Conferences/awareness programs
- Statistics on number of healthcare providers, by geography
- Technological advancements/application area horizon/competitive intensity
- Traction areas in respective segments and sub-segments
- Issues involved/barriers in adoption

The following illustrative figure shows the market forecast methodology applied in making this report:

FIGURE 4

MARKET FORECAST METHODOLOGY



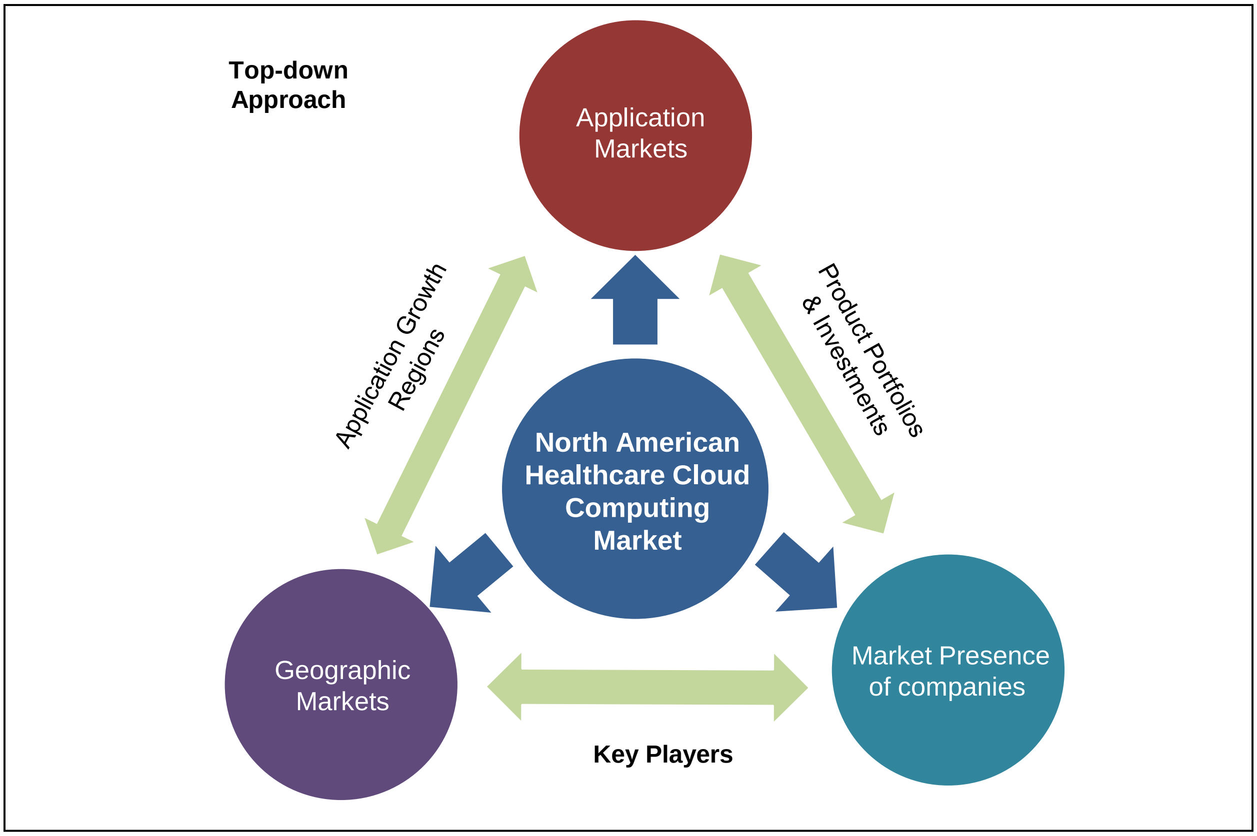
Source: MarketsandMarkets Analysis

1.5.4 MARKET CRACKDOWN & DATA TRIANGULATION

After arriving at the overall market size from the market size estimation process explained above, the total market was split into several segments and sub-segments by various types of classifications. In order to complete the overall market engineering process and to arrive at the exact statistics for all the market segments and sub-segments, the data triangulation and market crackdown procedures explained below were implemented, wherever applicable. The following figure shows the market crackdown structure and the data triangulation methodology implemented in the market engineering process for making this report.

FIGURE 5

DATA TRIANGULATION METHODOLOGY



Source: MarketsandMarkets Analysis

The figure shows the market statistics model derived for the major segments of the market (by application, deployment mode, services model, pricing model, component, end user, and geography) using the overall healthcare cloud computing market statistics, via a top-down procedure. The percentage splits of the sub-segments categorized under the applications, deployment mode, services model, pricing model, component, end user, and geographic markets were used to arrive at the market size of each individual sub-segment.

Thus, data was triangulated among seven major categories, namely, market size by application, deployment mode, services model, pricing model, component, end user, and geography.

1.5.4.1 Key Data Points from secondary sources

Data Point	Description
Market revenue	Company Financials, SEC Filings, Magazines, Journals, Press Releases, Paid Databases, Expert Interviews, and MarketsandMarkets Data Repository
Market revenue of companies	Annual Reports, SEC Filings, Company Websites, Investor Presentations, Public Databases, and MarketsandMarkets Data Repository
Qualitative information (market dynamics and market trends)	Annual Reports, SEC Filings, Cloud Computing Association (CCA), Healthcare Information and Management Systems Society (HIMSS), Centers for Disease Control and Prevention (CDC), California Association of Public Hospitals and Health Systems (CAPH), Federally Qualified Health Centers (FQHCs), General Physician Hospital Organization (GPHO), The Cloud Computing Association (CCA), The Institute of Electrical and Electronics Engineers (IEEE) Computer Society, Centers for Medicare & Medicaid Services (CMS), Journals, Press Releases, Investor Presentations, Healthcare Cloud Computing News Forums, Expert Interviews, and MarketsandMarkets Analysis

1.5.4.2 Key Data Points from Primary sources

Data Point	Description
North American Healthcare Cloud Computing Market	The current contribution of the North American market to the global healthcare cloud computing market is XX%–XX% The adoption of clinical information systems (CIS) is increasing as compared to non-clinical information systems (NCIS), mainly due to federal mandates. This has been driving the market for private clouds and SaaS services
North American Healthcare Cloud Computing Market, by Geography	The U.S. was confirmed to account for the largest share (XX%–XX%) in the market and is expected to grow at the highest CAGR, owing to the increasing awareness about the

Data Point	Description
	benefits of cloud technology and requirement of digitization of patient records.
Drivers of the Market	Federal mandates for converting all patient and medical records to the digital format and cost benefits were identified as the main drivers by primary sources. These drivers are responsible for the high growth (CAGR of XX% from 2013 to 2018) of the market.
Restraining Factors	Although cloud technology is considered revolutionary for the healthcare market, primary sources indicated that security and maintenance of privacy of patient data are the restraining factors for the growth of this market.
Market Share Analysis	The major players in the healthcare cloud computing market are athenahealth, Inc., CareCloud Corporation, ClearData Networks, Inc., IBM Corporation, Oracle, and Rackspace Holdings, among others It has been confirmed from the primary sources that the cloud computing market in healthcare has players not accounting for a market share of more than XX%. Hence, it is a fragmented market.

1.5.5 ASSUMPTIONS

Particular	Description
Overall Market Value	Market value (revenue) is calculated based on bottom up approach with the summation of the individual markets for applications that include clinical and non-clinical applications. This market has also been triangulated as per the overall trend in the U.S. cloud computing market in healthcare.
General Assumptions	There will be no drastic changes in the market scenario during the forecast period There will be no changes in regulations which have a huge effect on the industry

TABLE OF CONTENTS

1 INTRODUCTION..26
1.1 OBJECTIVES OF THE STUDY..26
1.2 REPORT DESCRIPTION..26
1.3 MARKETS COVERED..28
1.4 STAKEHOLDERS..29
1.5 RESEARCH METHODOLOGY..30
1.5.1 SECONDARY AND PRIMARY RESEARCH METHODOLOGY..31
1.5.1.1 Secondary Research..31
1.5.1.2 Primary Research..32
1.5.2 MARKET SIZE ESTIMATION..33
1.5.3 MARKET FORECAST..35
1.5.4 MARKET CRACKDOWN & DATA TRIANGULATION..36
1.5.4.1 Key Data Points from secondary sources..38
1.5.4.2 Key Data Points from Primary sources..38
1.5.5 ASSUMPTIONS..40
2 EXECUTIVE SUMMARY..41
3 NORTH AMERICAN CLOUD COMPUTING HEALTHCARE MARKET DYNAMICS..45
3.1 INTRODUCTION..46
3.2 EVOLUTION OF CLOUD COMPUTING IN HEALTHCARE..48
3.3 MARKET SEGMENTATION..49
3.4 MARKET DYNAMICS..51
3.4.1 DRIVERS..52
3.4.1.1 Increased adoption of information technology to boost cloud adoption and reduce healthcare costs..52
3.4.1.2 Legislative reform of the Patient Protection and Affordable Care Act (PPACA)..53

3.4.1.3 Dynamic nature and assortment of health benefit plan designs 53
3.4.1.4 Proliferation of new payment models 54
3.4.1.5 Benefits of cloud —reduced costs, positive returns on investment (ROI), and better accessibility & mobility 54
3.4.1.6 Improvements in storage technology............................55
3.4.1.7 Greater flexibility and scalability of data 55
3.4.2 RESTRAINTS 56
3.4.2.1 Safeguarding patient information is a crucial task...........56
3.4.2.2 Interoperability & standardization 56
3.4.2.3 Migration from legacy systems is considered a tedious task by providers...57
3.4.3 OPPORTUNITIES & TRENDS 57
3.4.3.1 Telecloud 57
3.4.3.2 Formation of accountable care organizations 58

4 NORTH AMERICAN CLOUD COMPUTING HEALTHCARE MARKET, BY APPLICATIONS...59

4.1 INTRODUCTION 60
4.2 CLINICAL INFORMATION SYSTEMS (CIS) 61
4.2.1 ELECTRONIC MEDICAL RECORD (EMR) 64
4.2.2 PICTURE ARCHIVING & COMMUNICATION SYSTEM (PACS) 67
4.2.3 RADIOLOGY INFORMATION SYSTEM (RIS)...................... 70
4.2.4 COMPUTERIZED PHYSICIAN ORDER ENTRY (CPOE)........ 72
4.2.5 LABORATORY INFORMATION MANAGEMENT SYSTEM (LIMS) 74
4.2.6 PHARMACY INFORMATION SYSTEM (PIS) 76
4.2.7 OTHERS 79
4.3 NON CLINICAL INFORMATION SYSTEMS (NCIS).......................80
4.3.1 REVENUE CYCLE MANAGEMENT (RCM)............................ 82
4.3.2 AUTOMATIC PATIENT BILLING (APB)............................. 85
4.3.3 PAYROLL... 86
4.3.4 CLAIMS MANAGEMENT 88
4.3.5 COST ACCOUNTING... 90

4.3.6 OTHERS ... 92

5 NORTH AMERICAN CLOUD COMPUTING HEALTHCARE MARKET, BY DEPLOYMENT MODEL ... 94

5.1 INTRODUCTION ... 95
5.2 PRIVATE CLOUD ... 98
5.2.1 DRIVERS & CHALLENGES ... 99
5.2.1.1 Driver ... 99
5.2.1.1.1 Interoperability & sharing of data ... 99
5.2.1.1.2 Low capital Cost ... 99
5.2.1.2 Challenge ... 99
5.2.1.2.1 Appropriate vendor selection ... 99
5.2.2 EMERGING TREND ... 100
5.3 PUBLIC CLOUD ... 101
5.3.1 DRIVERS ... 102
5.3.1.1 Growing interest of healthcare information amongst patients ... 102
5.3.1.2 Increase in administrative efficiency at low cost ... 103
5.3.2 CHALLENGE ... 103
5.3.2.1 Security and privacy concerns ... 103
5.3.3 MARKET TRENDS ... 103
5.4 HYBRID CLOUD ... 105
5.4.1 DRIVERS & CHALLENGES ... 106
5.4.1.1 Drivers ... 106
5.4.1.1.1 Security and affordability ... 106
5.4.1.1.2 IT infrastructure stays on-premise ... 106
5.4.1.2 Challenge ... 106
5.4.1.2.1 Networking ... 106
5.4.2 ADOPTION TREND ... 106
5.5 COMMUNITY CLOUD ... 108

6 NORTH AMERICA CLOUD COMPUTING HEALTHCARE MARKET, BY SERVICE MODELS....109
6.1 INTRODUCTION....110
6.2 SOFTWARE-AS-A-SERVICE (SaaS)....112
6.2.1 SAAS ADOPTION IN HEALTHCARE PROVIDERS AND PAYERS....114
6.3 INFRASTRUCTURE-AS-A-SERVICE (IaaS)....119
6.3.1 IAAS ADOPTION IN HEALTHCARE PROVIDERS AND PAYERS....121
6.4 PLATFORM-AS-A-SERVICE (PaaS)....126
6.4.1 PAAS ADOPTION IN HEALTHCARE PROVIDERS AND PAYERS....128
7 CLOUD COMPUTING HEALTHCARE MARKET, BY PRICING MODEL....133
7.1 INTRODUCTION....134
7.2 PRICING MODELS....134
7.2.1 PAY-AS-YOU-GO MODEL....135
7.2.2 SPOT PRICING MODEL....138
7.3 COST COMPONENTS ANALYSIS FOR HEALTHCARE MARKET....140
7.3.1 SOFTWARE....140
7.3.2 HARDWARE....140
7.3.3 NETWORK....140
7.3.4 BACK-UP POWER....141
7.3.5 INSTALLATION SERVICES & ONGOING IT SUPPORT....141
8 NORTH AMERICAN CLOUD COMPUTING HEALTHCARE MARKET, BY COMPONENT....142
8.1 INTRODUCTION....143
8.2 SOFTWARE....144
8.2.1 CLINICAL INFORMATION SYSTEMS (CIS)....145
8.2.2 NON CLINICAL INFORMATION SYSTEMS OR NON CLINICAL HEALTHCARE SYSTEMS (NCIS OR NCHS)....145
8.2.3 OTHERS....145

8.3 HARDWARE 148
8.3.1 ACCESS DEVICES 149
8.3.2 PERIPHERALS 149
8.3.3 SERVERS 149
8.3.4 STORAGE DEVICES 150
8.3.5 NETWORKING DEVICES 150
8.4 SERVICES 152
8.4.1 CONSULTING 153
8.4.2 IMPLEMENTATION SERVICES 154
8.4.3 POST-SALE & MAINTENANCE 154
8.4.4 TRAINING SERVICES 154
9 NORTH AMERICA CLOUD COMPUTING HEALTHCARE MARKET, BY END USERS 157
9.1 INTRODUCTION 158
9.2 HEALTHCARE PROVIDERS 159
9.2.1 SMALL PROVIDERS 167
9.2.1.1 SaaS adoption in small-sized healthcare providers 167
9.2.1.2 IaaS adoption in small-sized healthcare providers 168
9.2.1.3 PaaS adoption in small-sized healthcare providers 169
9.2.2 MEDIUM PROVIDERS 170
9.2.2.1 SaaS adoption in medium-sized healthcare providers 171
9.2.2.2 IaaS adoption in medium-sized healthcare providers 172
9.2.2.3 PaaS adoption in medium-sized healthcare providers 173
9.2.3 LARGE PROVIDERS 174
9.2.3.1 SaaS adoption in large-sized healthcare providers 175
9.2.3.2 IaaS adoption in large-sized healthcare providers 176
9.2.3.3 PaaS adoption in large-sized healthcare providers 177
9.3 HEALTHCARE PAYERS 178
9.3.1 SMALL PAYERS 186
9.3.1.1 SaaS adoption in small-sized healthcare payers 186
9.3.1.2 IaaS adoption in small-sized healthcare payers 187
9.3.1.3 PaaS adoption in small-sized healthcare payers 188

9.3.2 MEDIUM PAYERS 189
9.3.2.1 SaaS adoption in medium-sized healthcare payers 190
9.3.2.2 IaaS adoption in medium-sized healthcare payers 191
9.3.2.3 PaaS adoption in medium-sized healthcare payers 192
9.3.3 LARGE PAYERS 193
9.3.3.1 SaaS adoption in large-sized healthcare payers 194
9.3.3.2 IaaS adoption in large-sized healthcare payers 195
9.3.3.3 PaaS adoption in large-sized healthcare payers 196
9.4 CLOUD COMPUTING DEPLOYMENT IN HEALTHCARE PROVIDERS AND PAYERS 197
9.4.1 INDICATIVE LIST OF CLOUD COMPUTING DEPLOYMENT IN HEALTHCARE PROVIDERS 202
9.4.2 INDICATIVE LIST OF CLOUD COMPUTING DEPLOYMENT IN HEALTHCARE PAYERS 208

10 GEOGRAPHIC ANALYSIS 211
10.1 INTRODUCTION 212
10.2 FACTORS INFLUENCING CLOUD COMPUTING MARKET DYNAMICS 214
10.2.1 CLOUD COMPUTING IS AN IDEAL SOLUTION FOR HANDLING THE GROWING AMOUNT OF DATA IN MEDICAL IMAGING 214
10.2.2 CONFERENCES TO PROPEL GROWTH BY CREATING AWARENESS & PRODUCT KNOWLEDGE 215
10.2.3 RISE IN INSURANCE ENROLLMENTS TRIGGERED BY PATIENT PROTECTION AND AFFORDABLE CARE ACT (MARCH 2010) 216
10.2.4 INCESSANTLY RISING EMR ADOPTION 217
10.2.5 INADEQUATE IT INFRASTRUCTURE AMONGST PAYERS - A MAJOR GROWTH FACTOR 218
10.3 U.S. HEALTHCARE CLOUD COMPUTING MARKET 219
10.4 CANADA HEALTHCARE CLOUD COMPUTING MARKET 232

11 COMPETITIVE LANDSCAPE 245
11.1 INTRODUCTION 245
11.2 CLIENT ACQUISITIONS 246

11.3 AGREEMENTS, PARTNERSHIPS, COLLABORATIONS, AND ALLIANCES 250
11.4 NEW PRODUCT LAUNCHES 253
11.5 ACQUISITIONS 255
11.6 OTHERS 258

12 COMPANY PROFILES 261

(Overview, Financials, Products & Services, Strategy, & Developments)*

12.1 ATHENAHEALTH, INC. 261
12.2 CARECLOUD CORPORATION 274
12.3 CARESTREAM HEALTH, INC. 279
12.4 CISCO SYSTEMS, INC. 283
12.5 CLEARDATA NETWORKS, INC. 287
12.6 DELL, INC. 297
12.7 EMC CORPORATION 304
12.8 GLOBAL NET ACCESS (GNAX) HEALTH 309
12.9 HEWLETT-PACKARD COMPANY 312
12.10 IBM CORPORATION 317
12.11 IRON MOUNTAIN, INC. 322
12.12 MERGE HEALTHCARE, INC. 326
12.13 MICROSOFT CORPORATION 331
12.14 ORACLE CORPORATION 337
12.15 VMWARE, INC. 347

*Details on Financials, Product & Services, Strategy, & Developments might not be captured in case of unlisted companies.

LIST OF TABLES

TABLE 1	NORTH AMERICAN HEALTHCARE CLOUD COMPUTING MARKET, BY APPLICATION, 2011–2018 ($MILLION)	60
TABLE 2	NORTH AMERICAN HEALTHCARE CIS MARKET, BY SEGMENT, 2011–2018 ($MILLION)	62
TABLE 3	NORTH AMERICAN HEALTHCARE CIS MARKET, BY GEOGRAPHY, 2011–2018 ($MILLION)	63
TABLE 4	NORTH AMERICAN EMR SOFTWARE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	66
TABLE 5	NORTH AMERICAN PACS SOFTWARE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	69
TABLE 6	NORTH AMERICAN RIS SOFTWARE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	71
TABLE 7	NORTH AMERICAN CPOE SOFTWARE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	73
TABLE 8	NORTH AMERICAN LIMS SOFTWARE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	75
TABLE 9	NORTH AMERICAN PIS SOFTWARE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	78
TABLE 10	OTHER CLINICAL CLOUD COMPUTING APPLICATIONS, BY GEOGRAPHY, 2011–2018 ($MILLION)	79
TABLE 11	NORTH AMERICAN NCIS CLOUD COMPUTING MARKET REVENUE, BY TYPE, 2011–2018 ($MILLION)	81
TABLE 12	NORTH AMERICAN NCIS CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	82
TABLE 13	NORTH AMERICAN RCM CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	84
TABLE 14	NORTH AMERICAN APB SOFTWARE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	86
TABLE 15	NORTH AMERICAN PAYROLL SOFTWARE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	88
TABLE 16	NORTH AMERICAN CLAIMS MANAGEMENT SOFTWARE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	90
TABLE 17	NORTH AMERICAN COST ACCOUNTING CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	91

TABLE 18	NORTH AMERICAN OTHER NON-CLINICAL CLOUD COMPUTING APPLICATIONS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	93
TABLE 19	NORTH AMERICAN CLOUD COMPUTING MARKET REVENUE, BY DEPLOYMENT MODEL, 2011–2018 ($MILLION)	97
TABLE 20	NORTH AMERICAN PRIVATE CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	98
TABLE 21	NORTH AMERICAN PRIVATE CLOUD COMPUTING MARKET REVENUE, BY APPLICATION, 2011–2018 ($MILLION)	100
TABLE 22	NORTH AMERICAN PUBLIC CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	102
TABLE 23	NORTH AMERICAN PUBLIC CLOUD COMPUTING MARKET REVENUE, BY APPLICATION, 2011–2018 ($MILLION)	104
TABLE 24	NORTH AMERICAN HYBRID CLOUD COMPUTING MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	105
TABLE 25	NORTH AMERICAN HYBRID CLOUD COMPUTING MARKET REVENUE, BY APPLICATION, 2011–2018 ($MILLION)	107
TABLE 26	NORTH AMERICA CLOUD COMPUTING MARKET REVENUE, BY SERVICE MODELS, 2011–2018 ($MILLION)	111
TABLE 27	HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY GEOGRAPHY FOR SAAS MARKET SEGMENT, 2011–2018 ($MILLION)	113
TABLE 28	HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY END USERS FOR SAAS MARKET SEGMENT, 2011–2018 ($MILLION)	114
TABLE 29	HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY DEPLOYMENT FOR SAAS MARKET SEGMENT, 2011–2018 ($MILLION)	115
TABLE 30	HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY PRIVATE CLOUD DEPLOYMENT, BY GEOGRAPHY FOR SAAS MARKET SEGMENT, 2011–2018 ($MILLION)	116
TABLE 31	HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY PUBLIC CLOUD DEPLOYMENT, BY GEOGRAPHY FOR SAAS MARKET SEGMENT, 2011–2018 ($MILLION)	117
TABLE 32	HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY HYBRID CLOUD DEPLOYMENT, BY GEOGRAPHY FOR SAAS MARKET SEGMENT, 2011–2018 ($MILLION)	118
TABLE 33	HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY GEOGRAPHY FOR IAAS MARKET SEGMENT, 2011–2018 ($MILLION)	120
TABLE 34	HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY END USERS FOR IAAS MARKET SEGMENT, 2011–2018 ($MILLION)	121
TABLE 35	HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY DEPLOYMENT FOR IAAS MARKET SEGMENT, 2011–2018 ($MILLION)	122

TABLE 36 HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY PRIVATE CLOUD DEPLOYMENT, BY GEOGRAPHY FOR IAAS MARKET SEGMENT, 2011–2018 ($MILLION) 123

TABLE 37 HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY PUBLIC CLOUD DEPLOYMENT, BY GEOGRAPHY FOR IAAS MARKET SEGMENT, 2011–2018 ($MILLION) 124

TABLE 38 HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY HYBRID CLOUD DEPLOYMENT, BY GEOGRAPHY FOR IAAS MARKET SEGMENT, 2011–2018 ($MILLION) 125

TABLE 39 HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY GEOGRAPHY FOR PAAS MARKET SEGMENT, 2013–2018 ($MILLION) 127

TABLE 40 HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY END USERS FOR PAAS MARKET SEGMENT, 2011–2018 ($MILLION) 128

TABLE 41 HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY DEPLOYMENT FOR PAAS MARKET SEGMENT, 2011–2018 ($MILLION) 129

TABLE 42 HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY PRIVATE CLOUD DEPLOYMENT, BY GEOGRAPHY FOR PAAS MARKET SEGMENT, 2011–2018 ($MILLION) 130

TABLE 43 HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY PUBLIC CLOUD DEPLOYMENT, BY GEOGRAPHY FOR PAAS MARKET SEGMENT, 2011–2018 ($MILLION) 131

TABLE 44 HEALTHCARE CLOUD COMPUTING MARKET: REVENUE FORECAST, BY HYBRID CLOUD DEPLOYMENT, BY GEOGRAPHY FOR PAAS MARKET SEGMENT, 2011–2018 ($MILLION) 132

TABLE 45 NORTH AMERICAN CLOUD COMPUTING HEALTHCARE MARKET, BY PRICING MODEL, 2011–2018 ($MILLION) 135

TABLE 46 PAY-AS-YOU-GO MODEL HEALTHCARE MARKET, BY GEOGRAPHY, 2011–2018 ($MILLION) 137

TABLE 47 SPOT PRICING MODEL HEALTHCARE MARKET, BY GEOGRAPHY, 2011–2018 ($MILLION) 139

TABLE 48 NORTH AMERICAN HEALTHCARE CLOUD COMPUTING MARKET, BY COMPONENT, 2011–2018 ($MILLION) 143

TABLE 49 NORTH AMERICAN HEALTHCARE CLOUD COMPUTING SOFTWARE MARKET REVENUE, BY DEPLOYMENT MODE, 2011–2018 ($MILLION) 146

TABLE 50 NORTH AMERICAN HEALTHCARE CLOUD COMPUTING SOFTWARE MARKET, BY GEOGRAPHY, 2011–2018 ($MILLION) 147

TABLE 51 NORTH AMERICAN HEALTHCARE CLOUD COMPUTING HARDWARE MARKET, BY DEPLOYMENT MODE, 2011–2018 ($MILLION) 150

TABLE 52 NORTH AMERICAN HEALTHCARE CLOUD COMPUTING HARDWARE MARKET, BY GEOGRAPHY, 2011–2018 ($MILLION) 151

TABLE 53 NORTH AMERICAN HEALTHCARE CLOUD COMPUTING SERVICES MARKET, BY DEPLOYMENT MODE, 2011–2018 ($MILLION) 155

TABLE 54	NORTH AMERICAN HEALTHCARE CLOUD COMPUTING SERVICES MARKET, BY GEOGRAPHY, 2011–2018 ($MILLION)	156
TABLE 55	HEALTHCARE PROVIDERS CLASSIFICATION	160
TABLE 56	NORTH AMERICAN SAAS MARKET REVENUE, BY PROVIDER, 2011–2018 ($MILLION)	161
TABLE 57	NORTH AMERICAN PROVIDER SAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	162
TABLE 58	NORTH AMERICAN IAAS MARKET REVENUE, BY PROVIDER, 2011–2018 ($MILLION)	163
TABLE 59	NORTH AMERICAN PROVIDER IAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	164
TABLE 60	NORTH AMERICAN PAAS MARKET REVENUE, BY PROVIDER, 2011–2018 ($MILLION)	165
TABLE 61	NORTH AMERICAN PROVIDER PAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	166
TABLE 62	NORTH AMERICAN SMALL PROVIDER SAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	167
TABLE 63	NORTH AMERICAN SMALL PROVIDER IAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	168
TABLE 64	NORTH AMERICAN SMALL PROVIDER PAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	169
TABLE 65	NORTH AMERICAN MEDIUM PROVIDER SAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	171
TABLE 66	NORTH AMERICAN MEDIUM PROVIDER IAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	172
TABLE 67	NORTH AMERICAN MEDIUM PROVIDER PAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	173
TABLE 68	NORTH AMERICAN LARGE PROVIDER SAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	175
TABLE 69	NORTH AMERICAN LARGE PROVIDER IAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	176
TABLE 70	NORTH AMERICAN LARGE PROVIDER PAAS MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	177
TABLE 71	HEALTHCARE PAYERS CLASSIFICATION	179
TABLE 72	NORTH AMERICAN SAAS MARKET REVENUE, BY PAYER, 2011–2018 ($MILLION)	180
TABLE 73	NORTH AMERICAN SAAS PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	181
TABLE 74	NORTH AMERICAN IAAS MARKET REVENUE, BY PAYER, 2011–2018 ($MILLION)	182

TABLE 75	NORTH AMERICAN IAAS PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	183
TABLE 76	NORTH AMERICAN PAAS MARKET REVENUE, BY PAYER, 2011–2018 ($MILLION)	184
TABLE 77	NORTH AMERICAN PAAS PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	185
TABLE 78	NORTH AMERICAN SAAS SMALL PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	186
TABLE 79	NORTH AMERICAN IAAS SMALL PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	187
TABLE 80	NORTH AMERICAN PAAS SMALL PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	188
TABLE 81	NORTH AMERICAN SAAS MEDIUM PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	190
TABLE 82	NORTH AMERICAN IAAS MEDIUM PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	191
TABLE 83	NORTH AMERICAN PAAS MEDIUM PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	192
TABLE 84	NORTH AMERICAN SAAS LARGE PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	194
TABLE 85	NORTH AMERICAN IAAS LARGE PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	195
TABLE 86	NORTH AMERICAN PAAS LARGE PAYER MARKET REVENUE, BY GEOGRAPHY, 2011–2018 ($MILLION)	196
TABLE 87	HEALTHCARE PROVIDERS CLASSIFICATION BASED ON BED CAPACITY	198
TABLE 88	NORTH AMERICAN HEALTHCARE SAAS CLOUD SERVICES MARKET VOLUME, 2011–2018 (UNITS)	199
TABLE 89	NORTH AMERICAN HEALTHCARE IAAS CLOUD SERVICES MARKET VOLUME, 2011–2018 (UNITS)	200
TABLE 90	NORTH AMERICAN HEALTHCARE PAAS CLOUD SERVICES MARKET VOLUME, 2011–2018 (UNITS)	201
TABLE 91	INDICATIVE LIST OF CLOUD COMPUTING DEPLOYMENT IN HEALTHCARE PROVIDERS (2010–JANUARY 2014)	202
TABLE 92	HEALTHCARE PAYERS CLASSIFICATION BASED ON REVENUE ($MILLION)	208
TABLE 93	INDICATIVE LIST OF CLOUD COMPUTING DEPLOYMENT IN HEALTHCARE PAYERS (2010–JANUARY 2014)	208
TABLE 94	NORTH AMERICAN HEALTHCARE CLOUD COMPUTING MARKET, 2011–2018 ($MILLION)	213
TABLE 95	U.S. HEALTHCARE CLOUD COMPUTING MARKET, BY APPLICATION, 2011–2018 ($MILLION)	219

TABLE 96	U.S. HEALTHCARE CLOUD COMPUTING MARKET, BY CIS, 2011–2018 ($MILLION)	220
TABLE 97	U.S. HEALTHCARE CLOUD COMPUTING MARKET, BY NCIS, 2011–2018 ($MILLION)	221
TABLE 98	U.S. CLOUD COMPUTING MARKET, BY DEPLOYMENT, 2011–2018 ($MILLION)	222
TABLE 99	U.S. HEALTHCARE CLOUD COMPUTING MARKET, BY PRICING MODEL, 2011–2018 ($MILLION)	223
TABLE 100	U.S. HEALTHCARE CLOUD COMPUTING MARKET, BY SERVICE, 2011–2018 ($MILLION)	224
TABLE 101	U.S. MARKET FOR SAAS, BY END USER, 2011–2018 ($MILLION)	225
TABLE 102	U.S. MARKET FOR SAAS, BY PROVIDER, 2011–2018 ($MILLION)	225
TABLE 103	U.S. MARKET FOR SAAS, BY PAYER, 2011–2018 ($MILLION)	226
TABLE 104	U.S. MARKET FOR IAAS, BY END USER, 2011–2018 ($MILLION)	227
TABLE 105	U.S. MARKET FOR IAAS, BY PROVIDER, 2011–2018 ($MILLION)	227
TABLE 106	U.S. MARKET FOR IAAS, BY PAYER, 2011 – 2018 ($MILLION)	228
TABLE 107	U.S. MARKET FOR PAAS, BY END USER, 2011–2018 ($MILLION)	229
TABLE 108	U.S. MARKET FOR PAAS, BY PROVIDER, 2011–2018 ($MILLION)	229
TABLE 109	U.S. MARKET FOR PAAS, BY PAYER, 2011–2018 ($MILLION)	230
TABLE 110	U.S. HEALTHCARE CLOUD COMPUTING MARKET BY COMPONENT, 2011–2018 ($MILLION)	231
TABLE 111	CANADA HEALTHCARE CLOUD COMPUTING MARKET, BY APPLICATION, 2011–2018 ($MILLION)	232
TABLE 112	CANADA HEALTHCARE CLOUD COMPUTING MARKET, BY CIS, 2011–2018 ($MILLION)	233
TABLE 113	CANADA HEALTHCARE CLOUD COMPUTING MARKET, BY NCIS, 2011–2018 ($MILLION)	234
TABLE 114	CANADA CLOUD COMPUTING MARKET, BY DEPLOYMENT, 2011–2018 ($MILLION)	235
TABLE 115	CANADA HEALTHCARE CLOUD COMPUTING MARKET, BY PRICING MODEL, 2011–2018 ($MILLION)	236
TABLE 116	CANADA HEALTHCARE CLOUD COMPUTING MARKET, BY SERVICE, 2011–2018 ($MILLION)	237
TABLE 117	CANADA MARKET FOR SAAS, BY END USER, 2011–2018 ($MILLION)	238
TABLE 118	CANADA MARKET FOR SAAS, BY PROVIDER, 2011–2018 ($MILLION)	238
TABLE 119	CANADA MARKET FOR SAAS, BY PAYER, 2011–2018 ($MILLION)	239
TABLE 120	CANADA MARKET FOR IAAS, BY END USER, 2011–2018 ($MILLION)	240
TABLE 121	CANADA MARKET FOR IAAS, BY PROVIDER, 2011–2018 ($MILLION)	240
TABLE 122	CANADA MARKET FOR IAAS, BY PAYER, 2011–2018 ($MILLION)	241

TABLE 123	CANADA MARKET FOR PAAS, BY END USER, 2011–2018 ($MILLION)	242
TABLE 124	CANADA MARKET FOR PAAS, BY PROVIDER, 2011–2018 ($MILLION)	242
TABLE 125	CANADA MARKET FOR PAAS, BY PAYER, 2011–2018 ($MILLION)	243
TABLE 126	CANADA HEALTHCARE CLOUD COMPUTING MARKET, BY COMPONENT, 2011–2018 ($MILLION)	244
TABLE 127	CLIENT ACQUISITIONS, 2010–2014	248
TABLE 128	AGREEMENTS, PARTNERSHIPS, COLLABORATIONS, AND ALLIANCES, 2010–2014	251
TABLE 129	NEW PRODUCT LAUNCHES, 2010–2014	254
TABLE 130	ACQUISITIONS, 2010–2014	256
TABLE 131	OTHER STRATEGIES, 2010–2014	259

LIST OF FIGURES

FIGURE 1	RESEARCH METHODOLOGY STEPS	30
FIGURE 2	SAMPLING FRAME: PRIMARY RESEARCH	33
FIGURE 3	MARKET SIZE ESTIMATION METHODOLOGY	34
FIGURE 4	MARKET FORECAST METHODOLOGY	36
FIGURE 5	DATA TRIANGULATION METHODOLOGY	37
FIGURE 6	NORTH AMERICAN HEALTHCARE CLOUD COMPUTING MARKET, BY GEOGRAPHY, 2011–2018 ($MILLION)	42
FIGURE 7	TRADITIONAL ECOSYSTEM VS THE CLOUD ECOSYSTEM IN HEALTHCARE	49
FIGURE 8	CLOUD COMPUTING HEALTHCARE MARKET SEGMENTATION	50
FIGURE 9	CLOUD COMPUTING HEALTHCARE MARKET: DRIVERS & RESTRAINTS	51
FIGURE 10	FLOW OF A PHARMACY INFORMATION SYSTEM	77
FIGURE 11	CLOUD COMPUTING ARCHITECTURE, BY DEPLOYMENT MODELS	96
FIGURE 12	SOFTWARE MARKET SEGMENTATION BY APPLICATION	144
FIGURE 13	HEALTHCARE CLOUD COMPUTING HARDWARE MARKET SEGMENTATION	149
FIGURE 14	HEALTHCARE CLOUD COMPUTING SERVICES MARKET SEGMENTATION	153
FIGURE 15	NORTH AMERICAN HEALTHCARE CLOUD COMPUTING MARKET SEGMENTATION, BY END USER	159
FIGURE 16	MARKET REVENUE FOR CLOUD COMPUTING AMONGST SMALL-SIZED HEALTHCARE PROVIDERS	160
FIGURE 17	MARKET REVENUE FOR CLOUD COMPUTING AMONGST MEDIUM-SIZED HEALTHCARE PROVIDERS	170
FIGURE 18	MARKET REVENUE FOR CLOUD COMPUTING AMONGST LARGE-SIZED HEALTHCARE PROVIDERS	174
FIGURE 19	MARKET REVENUE FOR CLOUD COMPUTING AMONGST SMALL-SIZED HEALTHCARE PAYERS	179
FIGURE 20	MARKET REVENUE FOR CLOUD COMPUTING AMONGST MEDIUM-SIZED HEALTHCARE PAYERS	189
FIGURE 21	MARKET REVENUE FOR CLOUD COMPUTING AMONGST LARGE-SIZED HEALTHCARE PAYERS	193
FIGURE 22	CLOUD COMPUTING ADOPTION TREND AMONGST HEALTHCARE PROVIDERS	197
FIGURE 23	MARKET VOLUME OF CLOUD COMPUTING AMONGST HEALTHCARE PROVIDERS	198

FIGURE 24 ADOPTION OF CLOUD COMPUTING FOR SMALL, MEDIUM, AND LARGE PROVIDERS, (2011–JANUARY 2014) 207
FIGURE 25 MOST ACTIVE COMPANIES PROVIDING CLOUD SERVICES TO HEALTHCARE PROVIDERS (2010–JANUARY 2014) 207
FIGURE 26 KEY GROWTH STRATEGIES, 2010–2014 245
FIGURE 27 CLIENT ACQUISITIONS, BY COMPANY, 2010–2014 247
FIGURE 28 AGREEMENTS, PARTNERSHIPS, COLLABORATIONS, AND ALLIANCES, BY COMPANY, 2010–2014 250
FIGURE 29 NEW PRODUCT LAUNCHES, BY COMPANY, 2010–2014 253
FIGURE 30 ACQUSITIONS, BY COMPANY, 2010–2014 256
FIGURE 31 OTHER STRATEGIES, BY COMPANY, 2010–2014 259
FIGURE 32 ATHENAHEALTH, INC.: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2010–2012 262
FIGURE 33 ATHENAHEALTH, INC.: TOTAL REVENUE, BY SEGMENTS, 2012 ($MILLION) 262
FIGURE 34 CISCO: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2011–2013 284
FIGURE 35 CISCO: TOTAL REVENUE, BY SEGMENT, 2013 ($MILLION) 284
FIGURE 36 CISCO: TOTAL REVENUE, BY GEOGRAPHY, 2013 ($MILLION) 285
FIGURE 37 DELL, INC.: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2010–2012 298
FIGURE 38 DELL, INC.: TOTAL REVENUE, BY SEGMENT, 2012 ($MILLION) 299
FIGURE 39 DELL, INC.: TOTAL REVENUE, BY GEOGRAPHY, 2012 ($MILLION) 299
FIGURE 40 EMC CORP.: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2010–2012 305
FIGURE 41 EMC CORP.: TOTAL REVENUE, BY SEGMENT, 2012 ($MILLION) 305
FIGURE 42 EMC CORP.: TOTAL REVENUE, BY GEOGRAPHY, 2012 ($MILLION) 306
FIGURE 43 HEWLETT-PACKARD CO.: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2010–2012 313
FIGURE 44 HEWLETT-PACKARD CO.: TOTAL REVENUE, BY SEGMENT, 2012 ($MILLION) 314
FIGURE 45 HEWLETT-PACKARD CO.: TOTAL REVENUE, BY GEOGRAPHY, 2012 ($MILLION) 314
FIGURE 46 IBM: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2010–2012 318
FIGURE 47 IBM: TOTAL REVENUE, BY SEGMENT, 2012 ($MILLION) 318
FIGURE 48 IBM: TOTAL REVENUE, BY GEOGRAPHY, 2012 ($MILLION) 319
FIGURE 49 IRON MOUNTAIN, INC.: TOTAL REVENUE ($MILLION), 2010–2012 323

FIGURE 50 IRON MOUNTAIN, INC.: TOTAL REVENUE, BY SEGMENT, 2012 ($MILLION) 323
FIGURE 51 IRON MOUNTAIN, INC.: TOTAL REVENUE, BY GEOGRAPHY, 2012 ($MILLION) 324
FIGURE 52 MERGE HEALTHCARE, INC.: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2010–2012 327
FIGURE 53 MERGE HEALTHCARE, INC.: TOTAL REVENUE, BY SEGMENT, 2012 ($MILLION) 327
FIGURE 54 MERGE HEALTHCARE, INC.: TOTAL REVENUE, BY GEOGRAPHY, 2012 ($MILLION) 328
FIGURE 55 MICROSOFT CORP.: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2010–2012 332
FIGURE 56 MICROSOFT CORP.: TOTAL REVENUE, BY SEGMENT, 2012 ($MILLION) 332
FIGURE 57 MICROSOFT CORP.: TOTAL REVENUE, BY GEOGRAPHY, 2012 ($MILLION) 333
FIGURE 58 ORACLE CORP.: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2010–2012 338
FIGURE 59 ORACLE CORP.: TOTAL REVENUE, BY SEGMENT, 2012 ($MILLION) 339
FIGURE 60 ORACLE CORP.: TOTAL REVENUE, BY GEOGRAPHY, 2012 ($MILLION) 339
FIGURE 61 VMWARE, INC.: TOTAL REVENUE ($MILLION) AND R&D INTENSITY (%), 2010–2012 348
FIGURE 62 VMWARE, INC.: TOTAL REVENUE, BY SEGMENT ($MILLION), 2012 349
FIGURE 63 VMWARE, INC.: TOTAL REVENUE, BY GEOGRAPHY, 2012 ($MILLION) 349

SAMPLE TABLES

TABLE 1

NORTH AMERICAN HEALTHCARE CLOUD COMPUTING MARKET, BY APPLICATION, 2011–2018 ($MILLION)

Application	2011	2012	2013	2018	CAGR % (2013–2018)
CIS	XX	XX	XX	XX	XX
NCIS	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Press Releases, Cloud Computing Association (CCA), Healthcare Information and Management Systems Society (HIMSS), Centers for Disease Control and Prevention (CDC), California Association of Public Hospitals and Health Systems (CAPH), General Physician Hospital Organization (GPHO), The Cloud Computing Association (CCA), The Institute of Electrical and Electronics Engineers (IEEE) Computer Society, Expert Interviews, MarketsandMarkets Analysis

TABLE 2

NORTH AMERICAN HEALTHCARE CIS MARKET, BY GEOGRAPHY, 2011–2018 ($MILLION)

Region	2011	2012	2013	2018	CAGR % (2013-2018)
U.S.	XX	XX	XX	XX	XX
Canada	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Press Releases, Cloud Computing Association (CCA), Healthcare Information and Management Systems Society (HIMSS), Centers for Disease Control and Prevention (CDC), California Association of Public Hospitals and Health Systems (CAPH), General Physician Hospital Organization (GPHO), The Cloud Computing Association (CCA), The Institute of Electrical and Electronics Engineers (IEEE) Computer Society, Expert Interviews, MarketsandMarkets Analysis

TABLE 3

NORTH AMERICAN CLOUD COMPUTING MARKET REVENUE, BY DEPLOYMENT MODEL, 2011–2018 ($MILLION)

Deployment Model	2011	2012	2013	2018	CAGR % (2013–2018)
Private	XX	XX	XX	XX	XX
Public	XX	XX	XX	XX	XX
Hybrid	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Press Releases, Cloud Computing Association (CCA), Healthcare Information and Management Systems Society (HIMSS), Centers for Disease Control and Prevention (CDC), California Association of Public Hospitals and Health Systems (CAPH), General Physician Hospital Organization (GPHO), The Cloud Computing Association (CCA), The Institute of Electrical and Electronics Engineers (IEEE) Computer Society, Expert Interviews, MarketsandMarkets Analysis

RELEATED REPORTS

➤ **WIRELESS HEALTH MARKET (WLAN, WMAN, WPAN, SENSORS, SMARTPHONE'S, TABLET PC, MOBILE APPS) - GLOBAL TRENDS, OPPORTUNITIES, COMPETITIVE LANDSCAPE & FORECASTS (2013 - 2018)**

According to the West Wireless Health Institute (WWHI), wireless health may be defined as "the use of wireless technologies for personal health management and health care delivery. Encompasses solutions that facilitate continuous access to health care information, expert advice, or therapeutic intervention enabled by ubiquitous telecommunication networks. Example applications include real-time monitoring, medication compliance and imaging".

➤ **MOBILE HEALTH APPS & SOLUTIONS MARKET BY CONNECTED DEVICES (CARDIAC MONITORING, DIABETES MANAGEMENT DEVICES), HEALTH APPS (EXERCISE, WEIGHT LOSS, WOMEN'S HEALTH, SLEEP AND MEDITATION), MEDICAL APPS (MEDICAL REFERENCE) – GLOBAL TRENDS & FORECAST TO 2018**

mHealth is a successful integration of mobile technology and healthcare services that entail a revolution in the global healthcare solutions market. The global mHealth market is estimated to be valued at $6.6 billion in 2013 and is expected to reach $20.7 billion by 2018 at a healthy CAGR of 25.5%.

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