



The Digital Health Intelligence PACS and RIS supplier market update for English acute trusts

Contents

Introduction.....	2
The PACS supplier market, 2014-2018	3
PACS market share by supplier, 2018.....	5
PACS supplier changes, 2016-2018.....	6
Refreshed details of PACS used by English acute trusts.....	8
The RIS supplier market, 2014-2018.....	17
RIS market share by supplier, 2018.....	18
RIS supplier changes, 2016-2018	19
Refreshed details of RIS used by English acute trusts.....	20
Conclusion.....	28

Introduction

After the end of contracts drawn up as part of the National Programme for IT in the English NHS, the PACS/RIS market was opened for suppliers to compete and for trusts to have more choice in selecting the supplier that suited their individual needs. However, Digital Health Intelligence reported in April 2015 that most trusts chose to renew their contracts from NPfIT PACS/RIS suppliers at a lower cost and looked to find alternative solutions in the market rather than make hasty procurement decisions.

As NHS organisations have further evaluated what they need and what is available from different suppliers, Digital Health Intelligence has seen a steady replacement of incumbent systems and substantial changes in market share positions. We see this trend continuing, especially with a large number of contracts up for renewal over the coming 12-24 months, of which we provide details within this report.

This report is an update on the PACS and RIS market over the last four years. Along with tables of past and future contract changes, you will find details of market share, market share changes and changes in suppliers over the last two years. There is also a table of when contracts are due to expire over the coming years to help you understand the activity in the NHS imaging market.

The PACS supplier market, 2014-2018

Picture archiving and communication systems (PACS) saw full market adoption in English trusts by 2014. There was significant market refresh seen in the market during the period June 2013-June 2015.

Since that period, there has been constant activity in the PACS market with trusts changing supplier according to need.

The PACS market has changed over the past four years, with market shares notably shifting. The two suppliers which have lost the biggest PACS market share over the last four years are GE Healthcare and Agfa, who have respectively lost 21 and 16 trust contracts since 2014. Despite GE Healthcare having struggled to maintain contracts, it currently still has the most sizeable PACS market share at 19.6%.

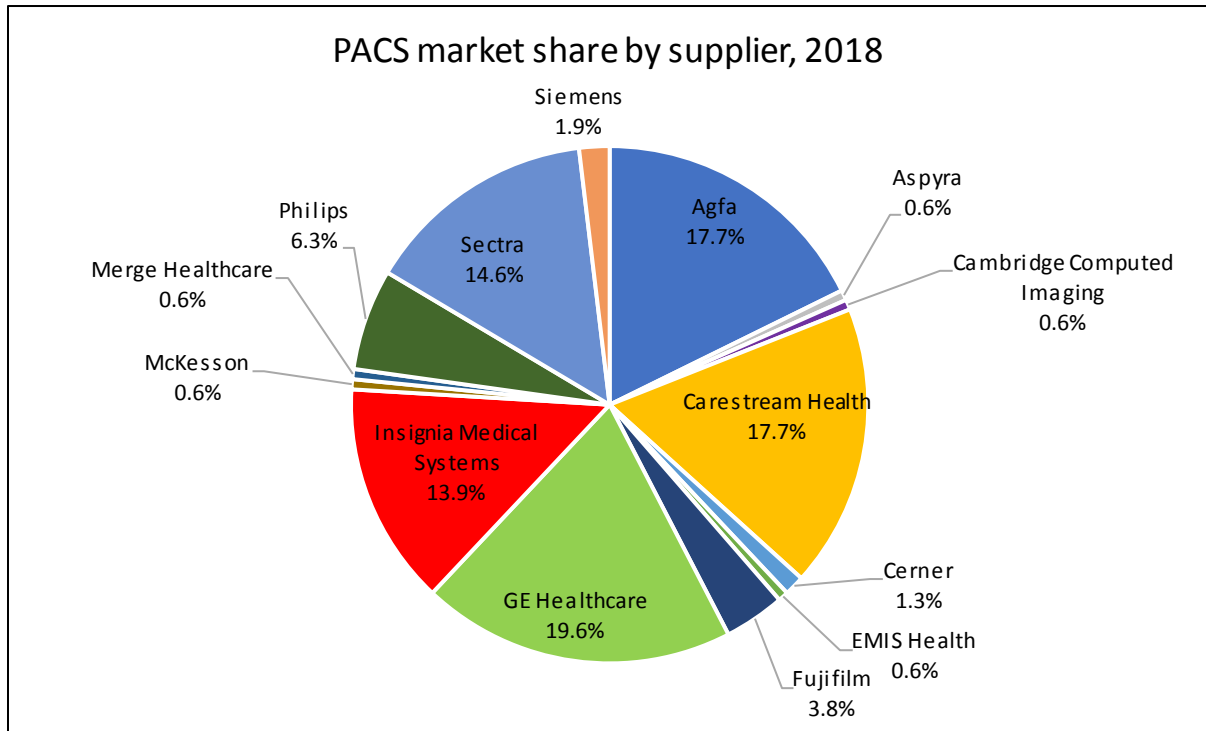
Newer entrants have served to shake up the market. British supplier Insignia Medical Systems, for instance, only supplied its PACS to six trusts in 2014. By June 2018, the company had contracts with 22 organisations. Their customer base is still only in the South, Midlands and East of England where they have widely penetrated the PACS market, to the detriment to other, more established PACS suppliers. The firm has won several PACS contracts from smaller to mid-size acute trusts which have collaborated to procure a joint PACS system. Royal Berkshire NHS Foundation Trust is the rare example of a large trust which singularly procured an Insignia Medical PACS, in 2016.

Other large NHS trusts have not changed their PACS supplier over the last four years and have instead opted for system upgrades. For example, Barts Health NHS Trust – the largest NHS trust in England – has been using the Sectra PACS system since 2013 and University Hospitals Birmingham NHS Foundation Trust has had an Agfa PACS system in place since 2008. Carestream Health has seen steady market growth over the past four years, and Agfa steady market contraction, such that they now have an equal market share –they both capture 17.7% of the NHS English acute market in 2018.

At the current rate of trajectory, Digital Health believes that Carestream Health will become the dominant supplier in the PACS market and will overtake the current two leading PACS suppliers, GE Healthcare and Agfa, if these two giants do not refocus current strategies in this area.

Supplier	PACS market share (%)					Changes (%) 2014-2018	Changes in accounts 2014- 2018
	2014	2015	2016	2017	2018		
Insignia Medical Systems	3.8	10.4	11.1	12.5	13.9	10.1	16
Carestream Health	10.8	15.6	15.7	16.9	17.7	7.0	11
Philips	3.2	6.5	6.5	6.3	6.3	3.2	5
Sectra	12.0	11.7	12.4	13.1	14.6	2.5	4
Fujifilm	1.9	3.9	3.9	3.8	3.8	1.9	3
Cerner	0.6	0.6	0.7	1.3	1.3	0.6	1
Others	3.8	2.6	3.3	4.4	3.2	-0.6	5
Siemens	3.2	1.9	2.0	1.9	1.9	-1.3	-2
Agfa	27.8	22.1	21.6	18.8	17.7	-10.1	-16
GE Healthcare	32.9	24.7	22.9	21.3	19.6	-13.3	-21

PACS market share by supplier, 2018



PACS supplier changes, 2016-2018

In the past two years, a total of 131 trusts have continued their contracts with their existing suppliers and 16 trusts have changed PACS supplier. Carestream Health gained four contracts over the last two years and has not lost any trust contracts to competitor PACS suppliers. In contrast, GE Healthcare lost six PACS contracts over the last two years and did not gain any new contracts from trusts who used competitor PACS. The other leading PACS supplier, Agfa, lost five trust contracts but also gained three new contracts from trusts which had previously used another PACS supplier.

Insignia Medical Systems benefitted from three Essex trusts going live with its PACS solutions in 2017 in a joint contract. Basildon and Thurrock University Hospitals Foundation Trust, Mid Essex Hospital Services NHS Trust and Southend University Hospital Foundation Trust all formerly used Agfa's Impax for their PACS. Insignia have previously successfully persuaded other trusts based in the South and Midlands and East to change providers.

For example, a consortium of five trusts- University Hospitals Plymouth NHS Trust, Northern Devon Healthcare NHS Trust, Torbay and South Devon NHS Foundation Trust, Royal Cornwall Hospitals NHS Trust and Royal Devon & Exeter NHS Foundation Trust – switched to Insignia Medical systems in 2013. Prior to the supplier change, the organisations in the consortium were running PACS from GE Healthcare under contracts set up through NPfIT.

The table below includes details of trusts that have switched suppliers over the past two years.

PACS Supplier Change			
Trust name	Region	2016 Supplier name	2018 Supplier name
Basildon and Thurrock University Hospitals NHS Foundation Trust	Midlands and East	Agfa	Insignia Medical Systems
Bedford Hospital NHS Trust	Midlands and East	Agfa	Insignia Medical Systems
Blackpool Teaching Hospitals NHS Foundation Trust	North	CGI	Agfa
Chelsea and Westminster Hospital NHS Foundation Trust	London	Sectra	Agfa
Chesterfield Royal Hospital NHS Foundation Trust	Midlands and East	GE Healthcare	Carestream Health
City Hospitals Sunderland NHS Foundation Trust	North	MEDITECH	Agfa
Countess of Chester Hospital NHS Foundation Trust	North	GE Healthcare	Carestream Health
Guy's and St Thomas' NHS Foundation Trust	London	GE Healthcare	Sectra

Imperial College Healthcare NHS Trust	London	Sectra	Carestream Health
Lancashire Teaching Hospitals NHS Foundation Trust	North	GE Healthcare	Sectra
Mid Cheshire Hospitals NHS Foundation Trust	North	GE Healthcare	Carestream Health
Mid Essex Hospital Services NHS Trust	Midlands and East	Agfa	Insignia Medical Systems
Southend University Hospital NHS Foundation Trust	Midlands and East	Agfa	Insignia Medical Systems
Surrey and Sussex Healthcare NHS Trust	South	Philips	Cerner
University Hospitals Of Morecambe Bay NHS Foundation Trust	North	GE Healthcare	Sectra
West Hertfordshire Hospitals NHS Trust	Midlands and East	Agfa	EMIS Health

*Since collecting this data, University College London Hospitals NHS Foundation Trust has confirmed it has changed its Agfa Impax system to a Carestream Health PACS. The system went live in April 2018 and the contract will run until 2025.

Refreshed details of PACS used by English acute trusts

Full details of all 147 English NHS acute trusts and their PACS suppliers can be found in the tables below. Installation dates, expiration dates and future contract actions are displayed.

Digital Health Intelligence data shows there will be 70 PACS contracts expiring the next two years, through to the end of 2020. There are only three contracts that operate on a rolling basis- two with York Teaching Hospital NHS Foundation Trust and one with North West Anglia NHS Foundation Trust.

Current supplier	Trust name	System name	Installation date	Contract end	Action/notes
GE Healthcare	Bolton NHS Foundation Trust	Centricity	2007-10-01	2020-06-30	
	University Hospitals of Derby and Burton NHS Foundation Trust	Centricity	2004-01-01	2019-01-01	
	University Hospitals of Derby and Burton NHS Foundation Trust	PACS	2006-12-01	2027-06-30	
	Calderdale and Huddersfield NHS Foundation Trust	Centricity	2001-01-01	2019-06-30	Calderdale and Huddersfield NHS Foundation trust selected Agfa Healthcare to provide a new PACS system. The value of this procurement was £4.9 M
	Cambridge University Hospitals NHS Foundation Trust	Centricity	Unknown	2019-01-01	Cambridge University Hospitals NHS Foundation Trust Selects Change Healthcare's Radiology PACS which will go-live at the end of the summer 2019.
	Chesterfield Royal Hospital NHS Foundation Trust	Centricity	n/a	2025-11-30	
	County Durham and Darlington NHS Foundation Trust	Centricity	2015-10-01	2025-11-25	
	Dartford and Gravesham NHS Trust	PACS	Unknown	2020-06-01	
	East Cheshire NHS Trust	PACS	2006-12-01	2018-06-30	
	East Kent Hospitals University NHS Foundation Trust	Centricity	2010-01-01	2020-01-01	
Great Ormond Street Hospital For Children NHS Foundation Trust	Centricity	2012-02-19	2022-11-30		

GE Healthcare	Kettering General Hospital NHS Foundation Trust	PACS	2016-06-01	2026-06-30	
	Maidstone and Tunbridge Wells NHS Trust	Centricity	2006-02-01	2020-01-01	
	Manchester University NHS Foundation Trust	Centricity	2007-12-01	2020-06-30	
	Medway NHS Foundation Trust	PACS	2007-01-01	2021-01-01	
	Medway NHS Foundation Trust	Centricity	2006-01-01	2021-11-19	
	Mid Cheshire Hospitals NHS Foundation Trust	PACS	2005-01-01	2017-06-30	
	North Cumbria University Hospitals NHS Trust	Centricity	2007-06-01	2019-06-31	
	Northampton General Hospital NHS Trust	Centricity	2016-01-01	2026-01-01	
	Nottingham University Hospitals NHS Trust	Centricity	2015-12-05	2025-12-05	
	Pennine Acute Hospitals NHS Trust	Centricity	2007-01-01	2018-06-30	
	Salford Royal NHS Foundation Trust	Centricity	2012-05-01	2020-06-30	The latest expiration of the current contract is 30.06.2020. This contract is for 2 years with the option to extend an additional one should it be required.
	Sherwood Forest Hospitals NHS Foundation Trust	PACS	2015-01-30	2025-01-30	
	South Tyneside NHS Foundation Trust	Centricity	2017-03-01	2024-02-28	
	Stockport NHS Foundation Trust	Centricity	2007-01-01	2019-04-01	
	Tameside and Glossop Integrated Care NHS Foundation Trust	Centricity	2006-01-01	out of contract	This system has been out of contract since 2018-06-30. The contract is currently out for tender as part of Greater Manchester procurement exercise.
	The Christie NHS Foundation Trust	Centricity	2007-03-01	2018-07-10	
	The Royal Orthopaedic Hospital NHS Foundation Trust	PACS	2007-09-01	2021-06-30	
United Lincolnshire Hospitals NHS Trust	Centricity	Unknown	2025-01-01		
University Hospitals Of Leicester NHS Trust	Centricity	2016-09-17	2026-09-17		
Walsall Healthcare NHS Trust	Centricity	2007-03-01	2019-06-31		

GE Healthcare	Wrightington, Wigan and Leigh NHS Foundation Trust	PACS	2007-10-01	2020-06-30	
	York Teaching Hospital NHS Foundation Trust	Interprize Archive	2010-02-01	Rolling contract	

Agfa	Airedale NHS Foundation Trust	Impax	Unknown	2027-01-01	
	Barnsley Hospital NHS Foundation Trust	Impax	2005-01-01	2027-01-01	
	Birmingham Women's and Children's NHS Foundation Trust	Impax	2003-01-01	2018-09-01	
	Blackpool Teaching Hospitals NHS Foundation Trust	CGI	Unknown	2018-07-06	Contract will be reviewed based on the contract term negotiated.
	Bradford Teaching Hospitals NHS Foundation Trust	Impax	2008-01-01	2027-01-01	
	Chelsea and Westminster Hospital NHS Foundation Trust	PACS	2015-01-01	2025-01-01	Only supplied to the West Middlesex site.
	City Hospitals Sunderland NHS Foundation Trust	Impax	2007-01-01	2019-01-01	
	Harrogate and District NHS Foundation Trust	Impax	2014-06-01	2027-06-30	
	Hull and East Yorkshire Hospitals NHS Trust	Impax	2006-10-16	2027-06-01	
	East Suffolk and North Essex NHS Foundation Trust	Enterprise Imaging	2014-06-01	2022-06-01	Agfa Impax system was replaced with Enterprise imaging. The five year contract was worth £1.6m in November 2017. This system comes from Ipswich Hospital NHS Trust before the merger.
	Leeds Teaching Hospitals NHS Trust	Impax	2014-06-01	2027-12-31	
	Mid Yorkshire Hospitals NHS Trust	PACS	2018-05-15	2028-05-15	This replaced GE Healthcare PACS which contract ended in 29 June 2018. contract with Carestream for 10 years.
	North Tees and Hartlepool NHS Foundation Trust	Impax	2006-01-01	2019-06-30	The Trust will be procuring a new PACS from June 2019.
	North West Anglia NHS Foundation Trust	Impax	2014-06-01	2019-01-31	Used at the Peterborough site.
	Northern Lincolnshire and Goole Hospitals NHS Foundation Trust	Impax	2017-02-06	2027-02-05	
Northumbria Healthcare NHS Foundation Trust	Impax	2004-09-01	2018-06-30		
Royal Brompton and Harefield NHS Foundation Trust	Impax	2009-01-01	2019-01-01		

Agfa	Sheffield Children's NHS Foundation Trust	Impax	2006-01-01	2027-06-30	
	Sheffield Teaching Hospitals NHS Foundation Trust	Impax	2005-05-01	2022-03-31	
	South Tees Hospitals NHS Foundation Trust	Impax	2004-01-01	2019-01-01	
	The Princess Alexandra Hospital NHS Trust	Enterprise Imaging	2018-04-28	unknown	Upgrade from Agfa Impax in 2017.
	The Queen Elizabeth Hospital King's Lynn NHS Foundation Trust	Impax	Unknown	2027-06-30	
	The Rotherham NHS Foundation Trust	Impax	2006-10-01	2019-01-01	
	The Shrewsbury and Telford Hospital NHS Trust	Impax	2003-01-01	2019-01-01	
	University College London Hospitals NHS Foundation Trust	Impax	Unknown	out of contract*	Out of contract since March 2017. They are currently in the process of changing providers. Carestream was expected to go live in Q2 2017. The Carestream contract was for 7 years. *
	University Hospitals Birmingham NHS Foundation Trust	Impax	2008-07-01	2019-06-30	
	West Suffolk NHS Foundation Trust	Enterprise Imaging for Radiology	2017-10-01	2027-09-30	
Carestream Health	West Suffolk NHS Foundation Trust	Impax	2005-01-01	2018-06-01	
	Aintree University Hospitals NHS Foundation Trust	Carestream VUE PACS	2013-06-01	2023-06-01	
	Alder Hey Children's NHS Foundation Trust	Carestream VUE PACS	2013-06-01	2023-07-30	The Trust has exercised its option to extend the contract by up to a further 5 years, taking it to a maximum end date of 30th June 2023.
	Chesterfield Royal Hospital NHS Foundation Trust	PACS	2003-11-01	2019-03-31	The EMRAD/ GE Solution is expected to be live before the Carestream annual renewal is due. The EMRAD GE Solution would have contract expiry until 2025.
	Countess of Chester Hospital NHS Foundation Trust	Carestream PACS	2016-03-01	2022-03-01	Carestream Health replaced GE Healthcare in Mar 2016.
	East and North Hertfordshire NHS Trust	Carestream PACS	1995-01-01	2022-04-01	
	Frimley Health NHS Foundation Trust	PACS/RIS	Unknown	2024-10-28	
	Frimley Health NHS Foundation Trust	Carestream VUE PACS	Unknown	2024-10-28	
	Gateshead Health NHS Foundation Trust	Carestream VUE PACS	2014-06-01	2024-06-01	

Carestream Health	Homerton University Hospital NHS Foundation Trust	Carestream VUE PACS	2014-06-01	2022-06-01	
	Imperial College Healthcare NHS Trust	Carestream VUE PACS	2015-12-01	2025-12-31	
	Liverpool Heart and Chest Hospital NHS Foundation Trust	Carestream VUE PACS	2013-06-01	2023-06-30	
	Liverpool Women's NHS Foundation Trust	Carestream VUE PACS	2014-04-09	2023-07-01	
	Luton and Dunstable University Hospital NHS Foundation Trust	Carestream VUE PACS	2015-12-01	2020-12-01	
	Poole Hospital NHS Foundation Trust	Carestream VUE PACS	2013-07-01	2021-02-01	
	Royal Free London NHS Foundation Trust	Carestream VUE PACS	2015-06-7	2022-06-07	
	Royal Liverpool and Broadgreen University Hospitals NHS Trust	Carestream VUE PACS	2013-05-13	2023-06-30	
	Southport and Ormskirk Hospital NHS Trust	Carestream VUE PACS	2013-06-01	2023-06-01	
	St Helens and Knowsley Teaching Hospitals NHS Trust	Carestream VUE PACS	2013-06-01	2023-06-01	
	Taunton and Somerset NHS Foundation Trust	CareVue	2013-07-01	2020-07-01	
	The Clatterbridge Cancer Centre NHS Foundation Trust	Carestream VUE PACS	2013-06-01	2023-06-30	The contract has been renewed for 5 years from 1st July 2018 therefore the expiration is 30th June 2023.
	The Newcastle Upon Tyne Hospitals NHS Foundation Trust	Carestream	2016-12-15	2026-12-15	
	The Royal Bournemouth and Christchurch Hospitals NHS Foundation Trust	Carestream VUE PACS	2013-07-01	2023-06-30	
	The Walton Centre NHS Foundation Trust	Carestream VUE PACS	2013-06-01	2023-06-30	
	Warrington and Halton Hospitals NHS Foundation Trust	Carestream VUE PACS	2013-06-01	2023-06-30	
	Wye Valley NHS Trust	PACS	2016-02-01	2019-02-01	
	Yeovil District Hospital NHS Foundation Trust	Carestream	2013-07-01	2020-07-01	
	York Teaching Hospital NHS Foundation Trust	Carestream VUE PACS	2016-07-01	2023-01-01	
	Sectra	Barking, Havering and Redbridge University Hospitals NHS Trust	PACS	2015-05-05	2020-06-15
Barts Health NHS Trust		PACS	2013-06-13	2023-06-13	
Chelsea and Westminster Hospital NHS Foundation Trust		EasyVision	2007-01-01	2025-01-01	
Croydon Health Services NHS Trust		IDS5	2005-01-01	2025-01-01	
Dartford and Gravesham NHS Trust		PACS	2017-10-01	2028-04-01	

Sectra	Epsom and St Helier University Hospitals NHS Trust	Sectra PACS	2006-01-01	2020-01-01
	Guy's and St Thomas' NHS Foundation Trust	PACS	2016-03-14	2027-01-01
	James Paget University Hospitals NHS Foundation Trust	PACS	2014-03-24	2024-03-30
	King's College Hospital NHS Foundation Trust	PACS	Unknown	2025-06-30
	Kingston Hospital NHS Foundation Trust	PACS	2015-01-15	2025-03-31
	Lancashire Teaching Hospitals NHS Foundation Trust	Sectra PACS	Unknown	2022-01-01
	Lewisham and Greenwich NHS Trust	PACS	Unknown	2025-01-01
	London North West Healthcare NHS Trust	PACS	2006-10-01	2022-01-01
	Moorfields Eye Hospital NHS Foundation Trust	Sectra PACS	2007-01-01	2020-01-01
	North Middlesex University Hospital NHS Trust	Sectra PACS	2015-06-30	2020-06-30
	Portsmouth Hospitals NHS Trust	PACS	2013-06-23	2023-06-23
	Salisbury NHS Foundation Trust	Sectra IDS7	2013-05-01	2020-07-31
	The Hillingdon Hospitals NHS Foundation Trust	EasyVision	2005-01-01	2019-06-01
	The Royal Marsden NHS Foundation Trust	IDS5	2006-03-31	2019-01-01
	University Hospital Southampton NHS Foundation Trust	IDS7	2013-06-01	2020-06-01
	University Hospitals Of Morecambe Bay NHS Foundation Trust	Sectra PACS	Unknown	2026-06-01
	Whittington Health NHS trust	IDS7	2014-02-09	2023-04-01
York Teaching Hospital NHS Foundation Trust	Sectra PACS	Unknown	Rolling contract	

*The new PACS system will be interfaced to the Epic electronic patient record due to go live in April 2019.

Insignia Medical Systems	Basildon and Thurrock University Hospitals NHS Foundation Trust	Insignia	2017-06-12	Unknown	This system Replaced Agfa in 2017.
	Bedford Hospital NHS Trust	Insight	2017-08-31	2022-08-31	This system Replaced Agfa in 2017.
	Buckinghamshire Healthcare NHS Trust	PACS	Unknown	2021-01-01	
	East Suffolk and North Essex NHS Foundation Trust	Insignia	2017-11-13	2023-12-31	
	Dorset County Hospital NHS Foundation Trust	Insight	2013-06-01	2020-05-31	
	George Eliot Hospital NHS Trust	PACS	2013-05-13	2021-05-12	
	Hampshire Hospitals NHS Foundation Trust	Insight viewer	2014-04-01	2021-04-01	
	Mid Essex Hospital Services NHS Trust	Insignia	2017-03-27	2027-06-30	This system Replaced Agfa in 2017.
	Milton Keynes University Hospital NHS Foundation Trust	Insight	2013-05-01	2020-01-01	
	Northern Devon Healthcare NHS Trust	PACS	2013-07-01	2020-01-01	
	Oxford University Hospitals NHS Foundation Trust	InSight PACS	2016-07-29	2023-07-01	
	Plymouth Hospitals NHS Trust	PACS	2013-07-01	2020-07-01	
	Royal Berkshire NHS Foundation Trust	Insignia	2016-02-11	2020-06-30	
	Royal Cornwall Hospitals NHS Trust	Insight Web	2013-07-01	2023-06-30	
	Royal Devon and Exeter NHS Foundation Trust	PACS	2013-06-01	2020-01-01	
	South Warwickshire NHS Foundation Trust	Insignia PACS	2013-05-01	2021-05-01	
	Southend University Hospital NHS Foundation Trust	Insignia	2017-06-08	Unknown	This system Replaced Agfa in 2017.
	Torbay and South Devon NHS Foundation Trust	PACS	2013-06-01	2020-01-01	
	University Hospitals Bristol NHS Foundation Trust	PACS	2013-04-01	2019-06-30	
	University Hospitals Coventry and Warwickshire NHS Trust	Insignia	2013-01-01	2021-05-30	
Weston Area Health NHS Trust	PACS	2013-01-01	2020-01-01		
Worcestershire Acute Hospitals NHS Trust	PACS	Unknown	2018-12-31		

Philips	Ashford and St Peter's Hospitals NHS Foundation Trust	Intellispace	2013-03-01	2020-06-01	
	Brighton and Sussex University Hospitals NHS Trust	Intellispace	Unknown	2020-06-30	
	East Sussex Healthcare NHS Trust	Intellispace	2013-03-01	2020-03-01	
	Gloucestershire Hospitals NHS Foundation Trust	Intellispace	2014-01-01	Unknown	
	Great Western Hospitals NHS Foundation Trust	Xcelera	2010-06-30	2021-01-31	
	Queen Victoria Hospital NHS Foundation Trust	Intellispace	2013-03-01	2018-01-01	
	Royal Surrey County Hospital NHS Foundation Trust	Intellispace PACS	2013-03-25	2020-06-01	This contract comes with an option to extend for five additional years until 2023.
	St George's University Hospitals NHS Foundation Trust	PACS	Unknown	2020-06-30	
	The Royal Wolverhampton NHS Trust	ISITE	2011-02-07	2019-01-01	
	Western Sussex Hospitals NHS Foundation Trust	Intellispace	2013-06-01	2020-06-19	
Fujifilm	Doncaster and Bassetlaw Teaching Hospitals NHS Foundation Trust	Synapse	Unknown	2019-01-01	
	Norfolk and Norwich University Hospitals NHS Foundation Trust	Synapse	2012-03-01	2022-03-01	
	North Bristol NHS Trust	Synapse	2014-01-13	2019-01-13	
	North West Anglia NHS Foundation Trust	Synapse	1994-01-01	Rolling contract	Used at the Hinchingsbrooke site
	Royal United Hospitals Bath NHS Foundation Trust	Synapse	2013-06-01	2019-01-01	
	The Robert Jones and Agnes Hunt Orthopaedic Hospital NHS Foundation Trust	Synapse	2013-09-06	2020-03-31	
	Siemens	East Lancashire Hospitals NHS Trust	Syngo Plaza	2013-04-01	2039-03-31
The Dudley Group NHS Foundation Trust		Plaza	Unknown	2020-12-18	
University Hospitals of North Midlands NHS Trust		PACS	Unknown	2022-06-30	

Cerner	Surrey and Sussex Healthcare NHS Trust	SkyVue/pvweb	2013-06-22	2020-06-22
	Wirral University Teaching Hospital NHS Foundation Trust	Cerner PACS	2011-03-01	2021-12-18
Aspyra	Great Western Hospitals NHS Foundation Trust	Aspyra PACS	2013-01-01	2020-11-30
Cambridge Computed Imaging	Papworth Hospital NHS Foundation Trust	Cadran	2002-03-01	2020-01-01
EMIS Health	West Hertfordshire Hospitals NHS Trust	Impax	2013-11-02	2017-06-30
McKesson	Royal National Orthopaedic Hospital NHS Trust	PACS	Unknown	2022-06-30

There are currently six trusts in the process of changing PACS supplier: Calderdale and Huddersfield NHS Foundation Trust, Cambridge University Hospitals NHS Foundation Trust, Tameside and Glossop Integrated Care NHS Foundation Trust, North Tees and Hartlepool NHS Foundation Trust, University College London Hospitals NHS Foundation Trust and Chesterfield Royal Hospital NHS Foundation Trust. Three of these trusts are discontinuing contracts with GE Healthcare for the Centricity PACS system, two are discontinuing contracts for the Agfa Impax system and one is stopping a Carestream Health PACS contract next year.

Cambridge University Hospitals NHS Foundation Trust has selected Change Healthcare to be its radiology picture archiving and communication system (PACS) provider. The new system is due to go live in summer 2019 and will replace a GE Healthcare Centricity system. Change Healthcare was created in May 2017 from the merger of McKesson Technology Solutions and revenue cycle and analytics company Change Healthcare.

The RIS supplier market, 2014-2018

Digital Health Intelligence data shows fewer supplier changes in the radiology information system (RIS) market. The biggest loser in the RIS market has been DXC Technology (formerly known as CSC) which has had a reduction of 9.9% market share from 2014-2018.

There has been continued preference for best-of-breed systems rather than suppliers who offer services as part of a broader electronic patient record suite. The supplier which has benefited the most from the preference of best-of-breed systems is Soliton IT, which continues to deploy RIS as a standalone solution. The company has won 11 accounts over the period from 2014-2018 and its market share has increased by 7.5% in this period, to stand at 11.3% in 2018.

Digital Health Intelligence forecasts Soliton IT will continue to increase its market share over the next few years by gaining RIS contracts in the small to mid-size acute trust market.

However, the large acute trusts – for example University Hospitals Bristol NHS Foundation Trust and University Hospitals of Derby and Burton NHS Foundation Trust – are predominantly extending their long-standing contracts with HSS.

Other large trusts have adopted the best-of-breed approach offered by EHR platform Cerner Millennium – for example Barts Health NHS Trust and Royal Berkshire NHS Foundation Trust.

Digital Health Intelligence analysis shows Cerner and Carestream Health to be steadily gaining RIS contracts, and we foresee this continuing over the coming years.

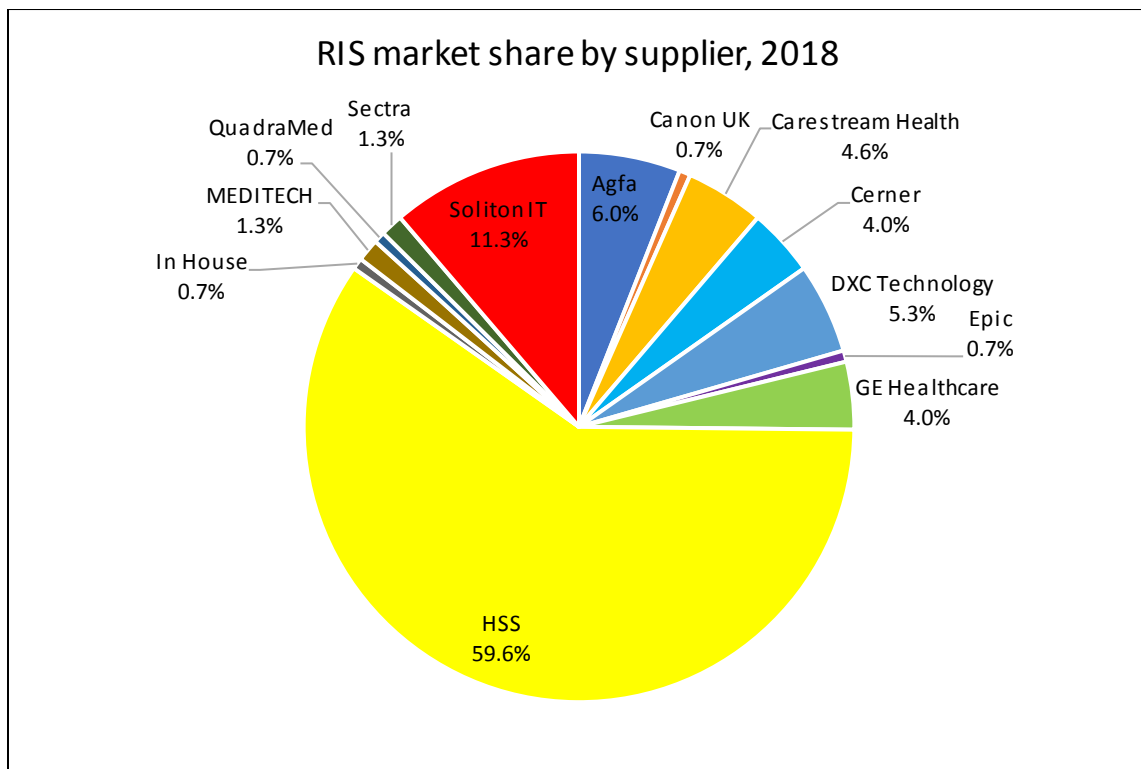
Supplier	RIS market shares (%)					Changes (%) 2014-2018	Changes in accounts 2014- 2018
	2014	2015	2016	2017	2018		
Soliton IT	3.8	9.1	8.5	9.7	11.3	7.5	11
Cerner	1.3	2.6	2.6	3.9	4.0	2.7	4
Carestream Health	2.5	3.9	4.6	4.5	4.6	2.1	3
Agfa	4.4	5.8	5.9	5.8	6.0	1.5	2
Sectra	0.0	1.3	1.3	1.3	1.3	1.3	2
GE Healthcare	3.2	3.2	2.6	3.2	4.0	0.8	1
HSS	59.5	63.0	62.7	61.0	59.6	0.1	-4
MEDITECH	1.9	1.3	1.3	1.3	1.3	-0.6	-1
Others	8.2	3.2	3.9	2.6	2.6	-5.6	-7
DXC Technology*	15.2	6.5	6.5	6.5	5.3	-9.9	-16

*DXC Technology was created in 2017 by the merger of CSC and the enterprise services business of Hewlett Packard Enterprise

RIS market share by supplier, 2018

HSS (part of Wellbeing Software) holds the largest RIS market share in England, with 59.6% (89 acute trusts) using its system. HSS has seen little change in its market share in the last four years, with a +0.1% change since 2014. HSS is followed by Soliton IT and Agfa which have 11.3% and 6.0% of market share, respectively.

Despite the RIS market being relatively stable, some trusts switched RIS suppliers when contracts under the National Programme for IT began to run out. Soliton IT has gained the most contracts, with 11 trusts going live with its RIS in the last four years. Additionally, Epsom and St Helier University Hospitals NHS Trust has signed a contract to replace its existing DXC Technology RadCentre system with Soliton Radiology+ RIS. The proposed go-live date for the Soliton solution is 28 October 2018.



RIS supplier changes, 2016-2018

Only five of the 147 English acute trusts changed RIS suppliers between 2016 and 2018. The company that has won the most RIS contracts over the last two years is Soliton IT. Two trusts based in London and one based in the North of England switched to a Soliton IT RIS solution (Kingston Hospital NHS Foundation Trust, University College London Hospitals NHS Foundation Trust and South Tyneside NHS Foundation Trust, respectively).

Interestingly, no trust switched to an HSS RIS solution over the last two years, despite the firm still being the dominant player in the RIS market.

RIS Supplier Change			
Trust Name	Region	2016 Supplier name	2018 Supplier name
Great Ormond Street Hospital For Children NHS Foundation Trust	London	CSC*	GE Healthcare
Kingston Hospital NHS Foundation Trust	London	CSC*	Soliton IT
South Tyneside NHS Foundation Trust	North	Silverlink Software	Soliton IT
Surrey and Sussex Healthcare NHS Trust	South	HSS	Cerner
University College London Hospitals NHS Foundation Trust	London	CGI	Soliton IT

*CSC is now called DXC Technology

Refreshed details of RIS used by English acute trusts

Digital Health Intelligence data shows there are 109 RIS contracts that will be expiring over the next two years, through to the end of 2020, and six rolling contracts. 34 RIS contracts are expiring after 2020, of which two contracts end in 2025 and the longest-running contract expiring in 2029.

Current supplier	Trust name	System name	Installation date	Contract end	Action/ notes
HSS	Aintree University Hospitals NHS Foundation Trust	CRIS	2013-01-01	2019-01-01	
	Airedale NHS Foundation Trust	CRIS	2008-01-01	2019-03-31	
	Alder Hey Children's NHS Foundation Trust	CRIS	2013-02-01	2018-02-01	
	Ashford and St Peter's Hospitals NHS Foundation Trust	CRIS	2005-01-01	2018-01-01	This service is managed by Philips, the trust's PACS supplier.
	Barnsley Hospital NHS Foundation Trust	CRIS	2005-01-01	2017-01-01	
	Bedford Hospital NHS Trust	CRIS	2007-02-26	2019-03-31	Annual contract at present but looking to merge solution in STP next potentially.
	Birmingham Women's and Children's NHS Foundation Trust	CRIS	2007-10-01	2018-01-01	from: Birmingham Women's Hospital site
	Bolton NHS Foundation Trust	CRIS	2013-04-20	2018-04-01	
	Bradford Teaching Hospitals NHS Foundation Trust	CRIS	2007-01-01	2022-09-30	
	Brighton and Sussex University Hospitals NHS Trust	CRIS Rowthorne	2013-03-25	2020-06-30	This service is managed by Philips, the trust's PACS supplier.
	Calderdale and Huddersfield NHS Foundation Trust	CRIS	2005-01-01	2020-01-01	
	Chesterfield Royal Hospital NHS Foundation Trust	CRIS	2007-01-01	2025-01-01	In 2015, a 10 year contract worth £30m was signed with GE Healthcare to provide PACS, RIS and VNA. RIS from HSS for the 10 year contract.

HSS	East Suffolk and North Essex NHS Foundation Trust	CRIS	1998-01-01	2020-12-07	
	County Durham and Darlington NHS Foundation Trust	CRIS	2008-01-01	2019-03-31	
	Dorset County Hospital NHS Foundation Trust	CRIS	2013-06-01	2020-05-31	
	East and North Hertfordshire NHS Trust	CRIS	1995-01-01	2018-06-30	
	East Cheshire NHS Trust	CRIS	2013-04-20	2018-04-01	
	East Lancashire Hospitals NHS Trust	CRIS	2010-03-01	2018-03-31	
	East Sussex Healthcare NHS Trust	CRIS Rowthorne	2013-03-25	2020-01-01	This service is managed by Philips, the trust's PACS supplier.
	Gloucestershire Hospitals NHS Foundation Trust	CRIS	2006-01-01	2019-01-01	
	Great Western Hospitals NHS Foundation Trust	CRIS	2014-05-01	2020-11-30	
	Guy's and St Thomas' NHS Foundation Trust	CRIS	Unknown	2019-01-01	
	Hampshire Hospitals NHS Foundation Trust	CRIS	2014-04-01	2021-04-01	
	Harrogate and District NHS Foundation Trust	CRIS	2014-04-01	2019-01-01	
	James Paget University Hospitals NHS Foundation Trust	CRIS	2010-03-01	2019-11-25	
	Kettering General Hospital NHS Foundation Trust	CRIS	2016-06-01	2026-06-30	
	King's College Hospital NHS Foundation Trust	CRIS	2004-11-01	2020-03-31	
	Leeds Teaching Hospitals NHS Trust	CRIS	2007-05-01	2018-06-30	
	Liverpool Heart and Chest Hospital NHS Foundation Trust	CRIS	2013-01-01	2019-01-01	
	Liverpool Women's NHS Foundation Trust	CRIS	2014-01-01	2019-07-01	
	London North West Healthcare NHS Trust	CRIS	Unknown	2022-01-01	
	Luton and Dunstable University Hospital NHS Foundation Trust	CRIS	2007-01-01	2019-05-02	
	Manchester University NHS Foundation Trust	CRIS	2013-04-20	2018-04-01	
	Mid Essex Hospital Services NHS Trust	RIS	2010-06-01	2018-07-31	
	Mid Yorkshire Hospitals NHS Trust	CRIS	2007-01-01	2019-06-30	
	Milton Keynes University Hospital NHS Foundation Trust	CRIS	2007-01-01	2020-01-01	
	North Bristol NHS Trust	CRIS	2013-06-30	2019-01-13	
	North Cumbria University Hospitals NHS Trust	CRIS	2006-01-01	2018-01-01	
	North Tees and Hartlepool NHS Foundation Trust	CRIS	2006-04-01	2019-04-22	
	North West Anglia NHS Foundation Trust	CRIS	2005-01-01	Rolling contract	from Peterborough site.
	North West Anglia NHS Foundation Trust	CRIS	2012-04-01	Rolling contract	from Hinchingsbrooke site.

HSS	Northern Devon Healthcare NHS Trust	CRIS	2013-02-09	2020-01-01	
	Northumbria Healthcare NHS Foundation Trust	CRIS	2005-03-01	Rolling contract	
	Nottingham University Hospitals NHS Trust	CRIS	2006-01-01	2025-01-01	In 2015, a 10-year contract worth £30m was signed with GE Healthcare to provide PACS, RIS and VNA. RIS from HSS for the 10-year contract.
	Oxford University Hospitals NHS Foundation Trust	CRIS	2006-01-01	2020-03-31	
	Papworth Hospital NHS Foundation Trust	CRIS	2005-01-01	2019-01-01	
	Pennine Acute Hospitals NHS Trust	CRIS	2013-04-20	2018-06-30	
	Plymouth Hospitals NHS Trust	CRIS	2013-02-09	2020-01-01	
	Portsmouth Hospitals NHS Trust	CRIS	2012-06-31	2020-06-01	
	Queen Victoria Hospital NHS Foundation Trust	CRIS Rowthorne	2013-03-25	2018-01-01	
	Royal Cornwall Hospitals NHS Trust	CRIS	2013-02-09	2020-01-01	
	Royal Devon and Exeter NHS Foundation Trust	CRIS	2013-02-09	2020-01-01	
	Royal Free London NHS Foundation Trust	CRIS	1998-10-01	2022-01-01	
	Royal Liverpool and Broadgreen University Hospitals NHS Trust	CRIS	2013-01-01	2019-01-01	
	Royal National Orthopaedic Hospital NHS Trust	CRIS	Unknown	2022-05-01	
	Royal Surrey County Hospital NHS Foundation Trust	CRIS	2003-06-01	2018-06-01	
	Royal United Hospitals Bath NHS Foundation Trust	CRIS	2007-02-01	2019-06-01	
	Salford Royal NHS Foundation Trust	CRIS	2012-05-01	2019-04-01	
	Salisbury NHS Foundation Trust	CRIS	2006-01-01	2020-07-31	
	Sandwell and West Birmingham Hospitals NHS Trust	CRIS	2007-01-01	2018-01-01	
	Sherwood Forest Hospitals NHS Foundation Trust	CRIS	2006-05-01	2025-01-01	In 2015, a 10 year contract worth £30m was signed with GE Healthcare to provide PACS, RIS and VNA. RIS from HSS for the 10 year contract.
	Southport and Ormskirk Hospital NHS Trust	CRIS	2013-01-01	2020-01-01	
	St Helens and Knowsley Teaching Hospitals NHS Trust	CRIS	2013-01-01	2019-01-01	

HSS	Stockport NHS Foundation Trust	CRIS	2013-04-20	2019-04-01	
	Tameside and Glossop Integrated Care NHS Foundation Trust	CRIS	2013-04-20	out of contract	The contract expired in April 2018. This system contract is currently out to tender now as part of a Greater Manchester exercise.
	The Christie NHS Foundation Trust	CRIS	2013-04-20	2018-04-01	
	The Clatterbridge Cancer Centre NHS Foundation Trust	CRIS	2013-01-01	2020-06-30	The contract has been renewed for 2 years from 1st July 2018 and therefore the expiration date is 30th June 2020.
	The Dudley Group NHS Foundation Trust	CRIS	Unknown	2019-03-31	
	The Hillingdon Hospitals NHS Foundation Trust	CRIS	1989-01-01	2019-03-31	
	The Princess Alexandra Hospital NHS Trust	CRIS	2006-01-01	2022-01-01	
	The Robert Jones and Agnes Hunt Orthopaedic Hospital NHS Foundation Trust	CRIS	2007-07-01	2020-01-01	
	The Royal Orthopaedic Hospital NHS Foundation Trust	CRIS	2007-08-01	2018-06-30	
	The Walton Centre NHS Foundation Trust	CRIS	2013-01-01	2018-06-30	
	Torbay and South Devon NHS Foundation Trust	CRIS	2013-02-09	2020-01-01	This service is managed by Accenture.
	United Lincolnshire Hospitals NHS Trust	CRIS	2006-01-01	2025-01-01	In 2015, a 10 year contract worth £30m was signed with GE Healthcare to provide PACS, RIS and VNA. RIS from HSS for the 10 year contract.
	University Hospital Southampton NHS Foundation Trust	CRIS	2006-01-01	2020-06-30	
	University Hospitals Birmingham NHS Foundation Trust	CRIS	2007-10-01	2018-01-01	
	University Hospitals Bristol NHS Foundation Trust	CRIS	2007-01-01	2020-05-10	
University Hospitals of Derby and Burton NHS Foundation Trust	CRIS	1992-01-01	2022-09-01		

HSS	University Hospitals Of Leicester NHS Trust	CRIS	2008-01-01	2025-01-01	In 2015, a 10 year contract worth £30m was signed with GE Healthcare to provide PACS, RIS and VNA. RIS from HSS for the 10 year contract.	
	University Hospitals Of Morecambe Bay NHS Foundation Trust	CRIS	2007-03-01	2018-06-01		
	University Hospitals of North Midlands NHS Trust	CRIS	2013-06-01	2027-10-01		
	Walsall Healthcare NHS Trust	CRIS	2007-02-01	2018-03-31		
	Warrington and Halton Hospitals NHS Foundation Trust	CRIS	2013-01-01	2018-01-01		
	West Hertfordshire Hospitals NHS Trust	CRIS	2015-06-23	2019-03-31		
	West Suffolk NHS Foundation Trust	CRIS	2006-01-01	2019-03-31	Jan 2018: Agfa HealthCare announced that West Suffolk NHS Foundation Trust has signed a contract to implement the Enterprise Imaging for Radiology platform, including a ten-year managed services agreement.	
	Western Sussex Hospitals NHS Foundation Trust	CRIS	2013-03-25	2018-01-01		
	Weston Area Health NHS Trust	CRIS	2005-01-01	2018-01-01		
	Worcestershire Acute Hospitals NHS Trust	CRIS	Unknown	2018-06-30		
	Wrightington, Wigan and Leigh NHS Foundation Trust	CRIS	2013-04-20	2018-07-01		
	Soliton IT	Buckinghamshire Healthcare NHS Trust	RIS	2015-06-01	2020-06-30	
		George Eliot Hospital NHS Trust	RIS	2013-05-13	2018-05-12	Feb 2017: System hosted by Univesity Hospitals Coventry and Warwickshire.
Imperial College Healthcare NHS Trust		RIS	2014-10-01	2026-06-30		
Mid Cheshire Hospitals NHS Foundation Trust		RIS	2013-04-20	2020-06-30		
Norfolk and Norwich University Hospitals NHS Foundation Trust		Radiology+	2014-03-29	2019-03-28		
North Middlesex University Hospital NHS Trust		RIS	2015-06-30	2020-06-30		

Soliton IT	Northern Lincolnshire and Goole Hospitals NHS Foundation Trust	Radiology+	2014-10-01	2018-12-01	
	Poole Hospital NHS Foundation Trust	Radiology+	2013-02-01	2018-02-01	
	South Tyneside NHS Foundation Trust	RIS	2018-01-28	2025-01-27	
	South Warwickshire NHS Foundation Trust	Soliton RIS	2013-05-01	2020-06-30	
	Southend University Hospital NHS Foundation Trust	Radiology+	2014-03-03	2019-03-01	
	St George's University Hospitals NHS Foundation Trust	RIS	2012-08-01	2020-06-30	
	The Royal Bournemouth and Christchurch Hospitals NHS Foundation Trust	Radiology+	2013-07-01	2018-07-01	
	The Royal Wolverhampton NHS Trust	Soliton	2011-02-07	2029-06-30	Previously used Philips.
	University College London Hospitals NHS Foundation Trust	Radiology+	2018-06-01	2025-06-01	This contract is for 7 years. Previously used CGI.
	University Hospitals Coventry and Warwickshire NHS Trust	RIS	2013-06-01	2018-05-12	
DXC Technology	Barking, Havering and Redbridge University Hospitals NHS Trust	Radcentre	N/A	2017-05-03	
	Basildon and Thurrock University Hospitals NHS Foundation Trust	RMS	2005-01-01	Rolling contract	
	Chelsea and Westminster Hospital NHS Foundation Trust	RadCentre	2007-01-01	2019-06-30	
	Epsom and St Helier University Hospitals NHS Trust	RadCentre	2002-01-01	2019-02-01	Epsom & St Helier University Hospitals NHS Trust opts for Soliton Radiology+ RIS to replace their existing RadCentre system. The proposed go-live date for Soliton RIS is the 28 October 2018. The current contract expires 84 months from the go-live date plus two-year optional extension.
	Kingston Hospital NHS Foundation Trust	RIS	2017-09-01	2027-08-31	
	Lewisham and Greenwich NHS Trust	Radcentre	2002-01-01	2019-03-31	
	Moorfields Eye Hospital NHS Foundation Trust	RIS	2005-06-01	2019-01-01	
	Northampton General Hospital NHS Trust	CRIS	2016-01-01	2026-01-01	

DXC Technology	The Queen Elizabeth Hospital King's Lynn NHS Foundation Trust	RadCentre	2004-01-01	Rolling contract	
Agfa	Birmingham Women's and Children's NHS Foundation Trust	Impax	2011-07-01	2018-07-01	Used in Birmingham Children's Hospital site.
	Blackpool Teaching Hospitals NHS Foundation Trust	RIS	2007-01-01	2018-03-31	
	Hull and East Yorkshire Hospitals NHS Trust	Agfa RIS	2006-08-01	2022-08-01	
	Royal Brompton and Harefield NHS Foundation Trust	Quadrat	2008-01-01	2019-01-01	
	Sheffield Children's NHS Foundation Trust	Agfa RIS	1995-01-01	Rolling contract	
	Sheffield Teaching Hospitals NHS Foundation Trust	Agfa	Unknown	2022-06-30	
	South Tees Hospitals NHS Foundation Trust	Impax	2004-01-01	2018-07-18	
	The Rotherham NHS Foundation Trust	Agfa RIS	Unknown	2019-06-30	
	The Shrewsbury and Telford Hospital NHS Trust	Agfa RIS	Unknown	2019-06-01	
Carestream Health	Frimley Health NHS Foundation Trust	RIS	Unknown	2024-10-28	
	Gateshead Health NHS Foundation Trust	CareVue	2013-06-01	2024-06-01	
	Taunton and Somerset NHS Foundation Trust	CareVue	2013-07-01	2018-07-01	
	The Newcastle Upon Tyne Hospitals NHS Foundation Trust	Carestream	2016-12-15	2026-06-30	
	The Royal Marsden NHS Foundation Trust	RIS	2011-10-30	2020-12-31	
	Wye Valley NHS Trust	RIS	2007-06-01	2019-02-01	
	Yeovil District Hospital NHS Foundation Trust	Carestream	2013-07-01	2020-07-01	
GE Healthcare	Dartford and Gravesham NHS Trust	RIS	2013-06-01	2020-01-01	
	East Kent Hospitals University NHS Foundation Trust	RIS	2013-06-01	2020-01-01	
	Great Ormond Street Hospital For Children NHS Foundation Trust	Centricity RIS-i	2012-02-19	2022-11-30	
	Maidstone and Tunbridge Wells NHS Trust	RIS	2013-06-01	2020-01-01	
	Medway NHS Foundation Trust	RIS	2013-06-01	2020-01-01	
	Northampton General Hospital NHS Trust	eRadcockpit	2016-01-01	2026-01-01	
Cerner	Barts Health NHS Trust	Millennium	2008-04-01	2022-02-04	
	Croydon Health Services NHS Trust	Millennium	2015-03-31	2025-03-31	A 10 year contract deal.
	Homerton University Hospital NHS Foundation Trust	Millennium	2004-01-01	2019-02-14	
	Royal Berkshire NHS Foundation Trust	Millennium	2016-09-09	2023-09-11	
	Surrey and Sussex Healthcare NHS Trust	RadNet	2013-06-22	2020-06-22	
	Wirral University Teaching Hospital NHS Foundation Trust	RadNet	2011-05-01	2021-12-18	

Sectra	Barts Health NHS Trust	RIS	2015-12-31	2023-06-13
	Whittington Health NHS trust	RIS	2014-05-01	2023-01-31
MEDITECH	City Hospitals Sunderland NHS Foundation Trust	HSS	1992-01-01	2018-09-01
	Countess of Chester Hospital NHS Foundation Trust	Meditech	1999-01-01	2020-11-30
Canon UK	Doncaster and Bassetlaw Teaching Hospitals NHS Foundation Trust	DelftDI Healthcare IT	2013-06-01	2019-06-30
Epic	Cambridge University Hospitals NHS Foundation Trust	EpicCare	2014-10-26	2023-04-04
In House	York Teaching Hospital NHS Foundation Trust	CPD	1994-01-01	N/A
QuadraMed	Lancashire Teaching Hospitals NHS Foundation Trust	QuadraMed Clinical Patient Record	2002-06-01	2019-01-01

Bedford Hospital NHS Trust currently has an HSS CRIS RIS system but has stated it is seeking to share a single solution across the Bedfordshire, Luton and Milton Keynes sustainability and transformation partnership (STP) area next potentially.

Digital Health Intelligence believes the merging of solutions across STPS will become more widely apparent in the next couple of years as trusts seek out RIS and PACS solutions which allow trusts to collaborate.

HSS has lost several RIS contracts. Tameside and Glossop Integrated Care NHS Foundation Trust came to the end of its contract with HSS in April 2018 and are now out to tender for a new solution as part of a part of a Greater Manchester exercise. Additionally, West Suffolk NHS Foundation Trust has opted to move from HSS CRIS to Agfa once its contract with HSS expires in March 2019.

Conclusion

Over the last two years, there has been more market activity in the PACS market as compared to the RIS market. 16 trusts have changes their PACS supplier as compared to only five trusts changing their RIS supplier. This highlights the relative stability in the RIS market with the majority of trusts opting to renew their current RIS contract.

However, there are significantly more RIS contracts expiring over the next two years as compared to PACS contracts. 109 RIS contracts will expire by the end of the year 2020 as compared to 70 PACS contracts. As these contracts expire, there is market opportunity for RIS and PACS supplier solutions which enable trusts to collaborate, as well as integrated PACS/RIS solutions.