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2004

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COMPETITOR INSIGHTS FOR INTERVENTIONAL CARDIOLOGY 2004

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Methodology

Global Interventional Cardiology Company Profiles utilizes information obtained from Millennium Research Group's *Global Markets for Interventional Cardiology*, including:

- *US Markets for Interventional Cardiology* (USIC04)
- *European Markets for Interventional Cardiology* (EUiIC04): France, Germany, Italy, UK
- *European Markets for Interventional Cardiology* (EUiiIC04): Benelux, Scandinavia, Spain, Switzerland
- *Japanese Markets for Interventional Cardiology* (JPIC04)

As such, the report utilizes the same methodology employed in the research of these reports. This methodology is presented in the following sections.

Research Methodology

The following report utilizes a number of methodologies to gather and present data and analysis. At the outset, a large survey of secondary sources is conducted. These sources act as the basis for the primary-research stage, which builds and enhances the quantitative and qualitative attributes of the early research. Secondary sources include:

Government Sources:

- Securities and Exchange Commission filings
- Food and Drug Administration and patent filings
- National Center for Health Statistics Data

Interventional Cardiology Companies:

- Annual reports, product brochures, corporate profiles, etc.

Internal Databases and Reports:

- Previous reports on similar/related sources

General Internet Searches, Medical Literature and Newspaper/Magazine Searches:

- Identifying various centers of specialization and articles that might provide leads for primary research.

The secondary-research stage builds the foundation for the primary research. The primary-research methodology has four steps:

Step 1: The first step involves an impartial scan of all the information gathered during the secondary-research stage to determine its utility based on the specific requirements of this report. Each piece of information is, thus, either discarded or marked as high or low priority. It is then organized appropriately as determined by the structure and sectioning of the report.

Step 2: At this stage, early assumptions are formed as to the implications of the information for the various IC market segments. These assumptions are then used to determine hypotheses using both inductive and deductive approaches. On the quantitative front, these hypotheses result in full historical and projected market data sets (market sizes [units and US\$] and market shares).

Step 3: At this stage, the research is in position for its most important primary phase – expert interviews. Throughout the secondary research, industry and medical experts are identified. These experts are now contacted by telephone and asked to participate in interviews on recent trends and developments in the industry. Interviews are either conducted at the time of the initial call or scheduled at the convenience of the expert. Interview questions are tailored to the expertise of the particular interviewee, although in most cases, the most important questions are asked of all experts. The questions are largely based on the assumptions and hypotheses developed in Step 2, which are then either augmented, discarded or adjusted, based on the views and positions put forth. Attempts are made, whenever possible, to crosscheck the views of various experts against each other and reach positions of consensus on issues and market numbers.

Step 4: The final stage of the primary research stage involves individual and group analysis by Millennium Research Group. All research results are assessed and crosschecked thoroughly to determine their validity, relevance and weight. From this process, qualitative conclusions are reached and data points finalized.

Forecast Methodology

In addition to Steps 1 through 4 (as outlined above), the following “bottom-up” methodology was followed in developing forecast assumptions for this report.

A comprehensive breakdown of various IC procedures was prepared using data from several sources including professional associations, government statistics, and

private research/media sources. Industry experts and practitioners were consulted to ensure accuracy and verify observed trends. As a crosscheck, total industry revenues available through 10Ks and other sources were compared against modeled industry revenues.

Using the best estimates of industry experts, practitioners, private research/media sources and in-house experts, year-by-year growth rates, and average prices, were applied individually to each sub-category to derive forecasts. These estimates were crosschecked by industry experts (marketing managers, product managers, CEOs, etc.) and further refined.

Overall findings were compared against market and procedure forecasts published by other sources to ensure reasonable estimates.

Currency Exchange Rates

All forecasts in this report use the average 2002 exchange rates presented in Exhibit M-1. Exchange rates used are the average exchange rates over the period 01/01/2003 to 31/12/2003 and are assumed, for the purpose of forecasting, to remain constant over the forecast period.

Note: In tables and graphs throughout the report, slight variation may appear and some Numbers may not add to totals due to rounding.

Exhibit M-1: Currency Exchange Rates, 2003

Country (Currency)	Exchange Rate (\$US per one unit of local currency)
Europe (Euro (€))	1.11229
Japan (Yen (¥))	0.0080
UK (Pound Sterling (£))	0.69052
Notes:	
1) All forecasts used in this report are calculated using the exchange rates provided in this table.	
2) These are the average exchange rates over the period 01/01/2003 to 30/11/2003.	
Source: Millennium Research Group.	

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