

Supported a leading U.S.-based healthcare system in assessing specific international opportunities in Europe and the Middle East, and helped shape its thinking around a true global strategy



Client Challenge

The client, a world renowned U.S.-based healthcare system, had taken initial steps to expand its operations outside the US, with mixed success. The client had historically taken an opportunistic approach to its international strategy and had initially engaged KPMG to provide an assessment on specific opportunities of interest in Europe and the Middle East, although it was also interested in other select countries across LATAM, EMEA and APAC regions

Project Phases

The KPMG United Kingdom and Saudi Arabia teams interviewed key stakeholders in their respective markets such as payers and competitors in order to provide the client with a comprehensive assessment of the opportunities in their respective markets

The U.S. team conducted interviews with a number of U.S.-based competitors to understand their perspectives on international expansion and how they had executed growth outside the US

U.S. team leveraged a five-part framework (i.e. healthcare system dynamics, Covid impact, geopolitical dynamic, demographics & competition) to assess an additional seven markets at a high level and worked with the in-market KPMG teams to provide additional data on a further eleven countries

Outcome For The Client



Produced a comprehensive assessment of the opportunities in both Europe and Middle East



Provided key 'lessons learned' from the international expansion of U.S.-based competitors



Highlighted to the client that it needed to 'step back' and ask some difficult questions that would allow it to reframe its global ambitions in a more holistic and strategic manner



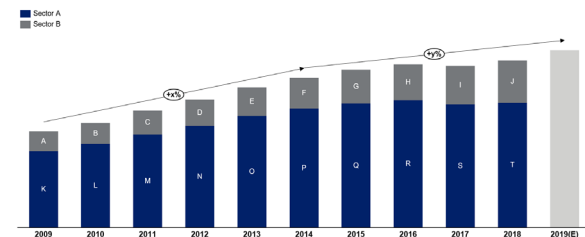
Supported the client in development of a key presentation to its Board, outlining the need for a true global strategy

European Opportunity

Overall market - Supply - Investment context

For those recently entered and currently entering the market, key decisions were originally made at a time where market growth was roughly three times current growth

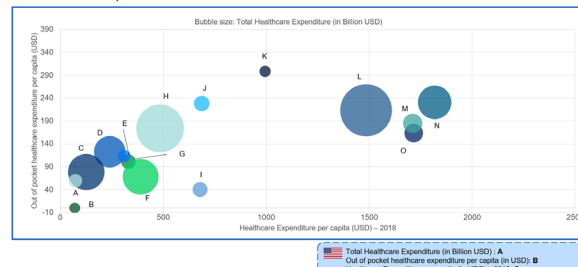
10 year hospital market growth rates, 2009-19(E)



Opportunities In Middle East

Overview of the Middle East

Healthcare expenditure per capita is the highest in M, N and O, whereas L has the highest total healthcare expenditure across the assessed ME countries



Framework For Assessing Additional Countries

Framework Assessment

KPMG leveraged a five-part framework to assess select markets at a high level, but a holistic global strategy is needed for X to execute against



- An assessment of the country's **geopolitical dynamic** and other macro considerations
- An overview of the country's **healthcare system**, e.g. healthcare expenditure
- An overview of the **demographics** and major causes of morbidity and mortality in the country
- Assessment of the **competitive dynamic** for X in that country
- An assessment of the impact that **SARS-Cov-2** has had on the country

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