



EHR Vendor Market

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October 2018



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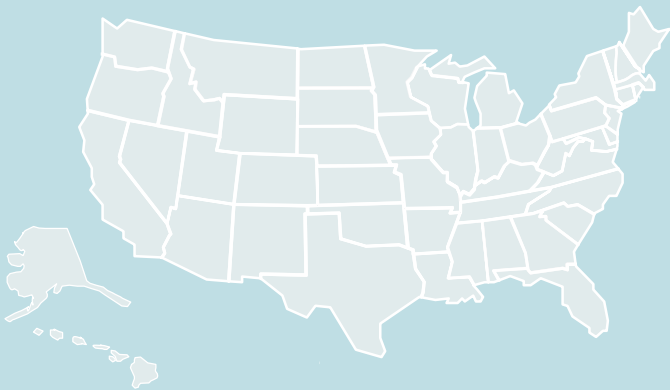
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Large Market Footprint

25,000 people firm wide (U.S.)
1,900 partners and professionals
90 offices in 50 states



High Growth

HCLS is a strategic growth priority and one of our highest growth industries.

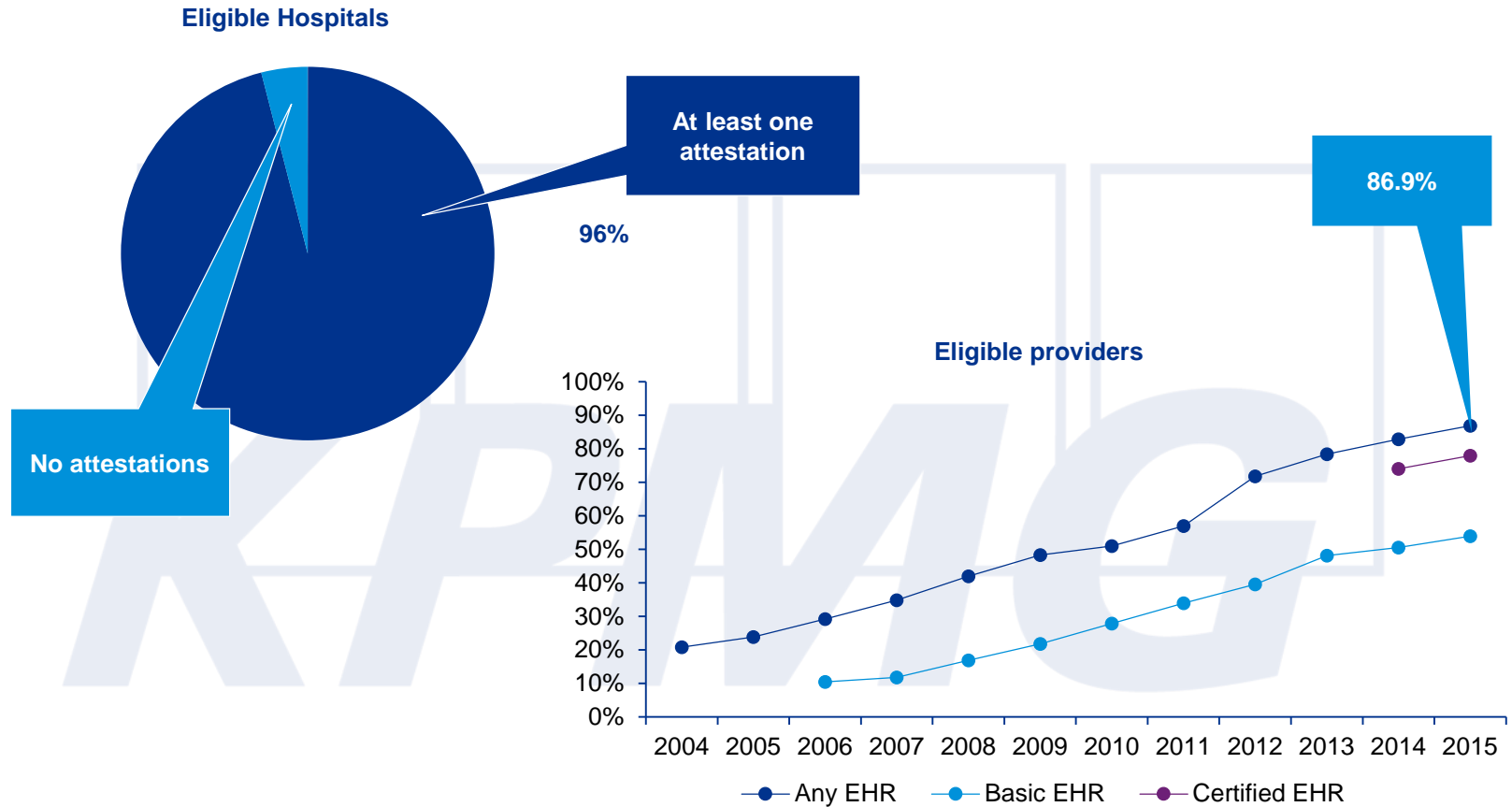


\$6.9B
US revenues

\$2.4B US Advisory
revenues

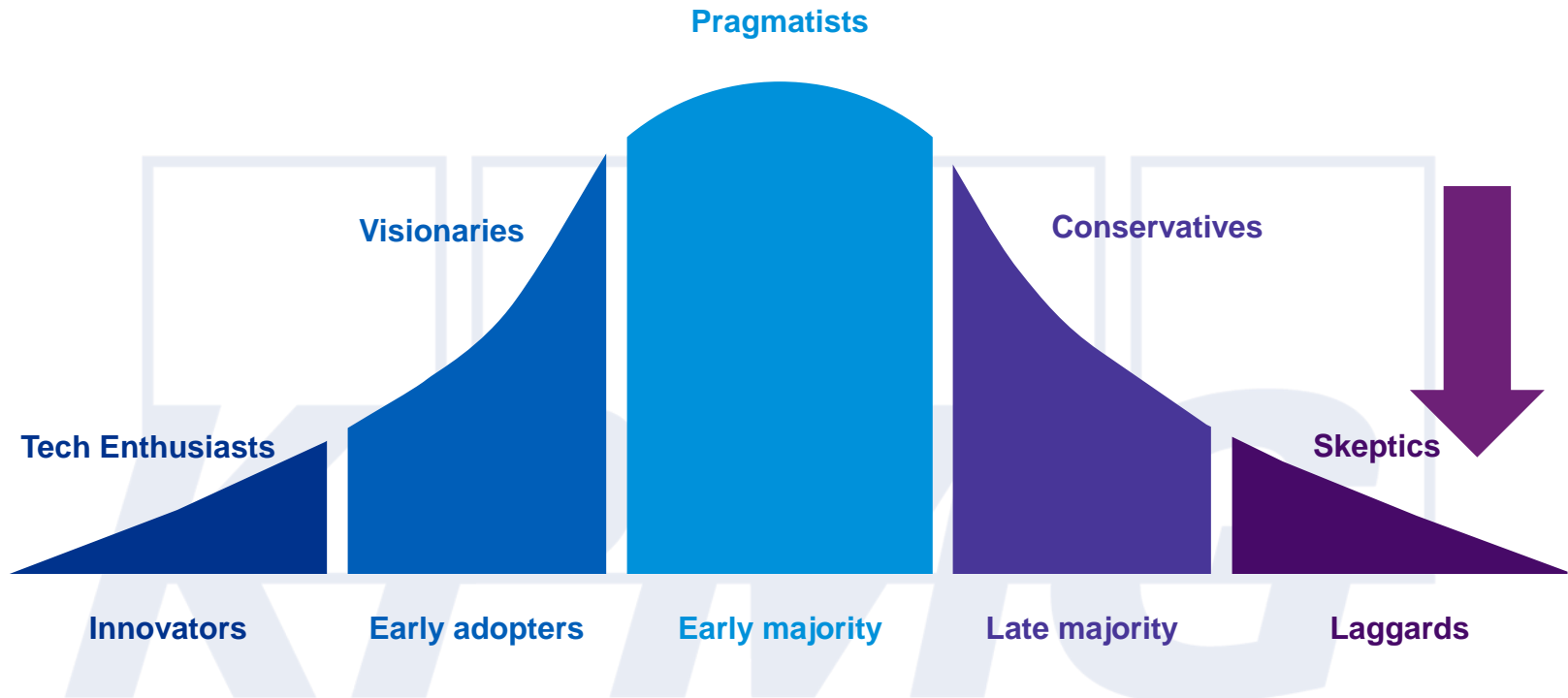


EHR adoption approaches 100%



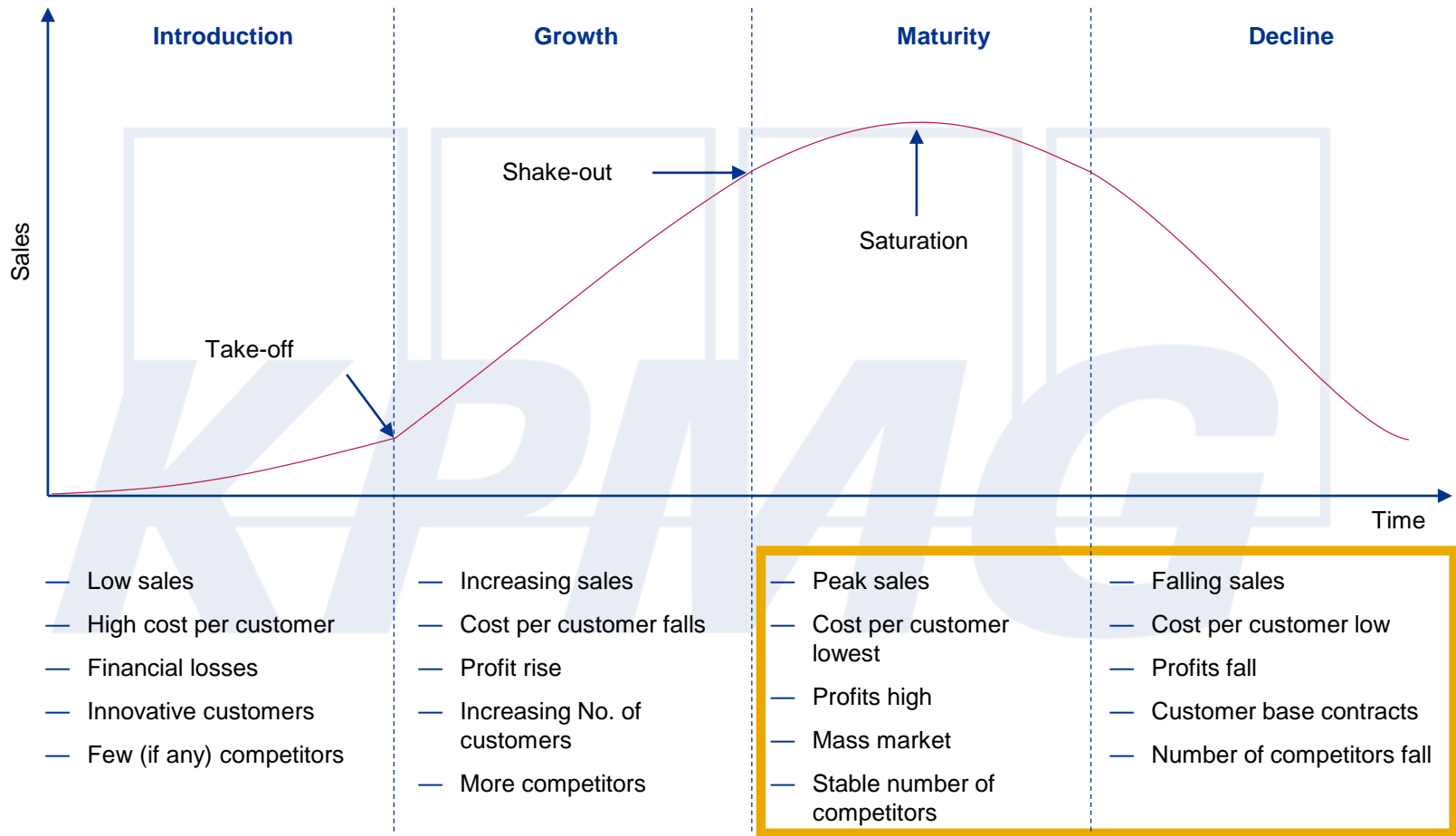
Office of the National Coordinator for Health Information Technology. 'Office-based Physician Electronic Health Record Adoption,' Health IT Quick-Stat #50. dashboard.healthit.gov/quickstats/pages/physician-ehr-adoption-trends.php. December 2016.

Geoffrey Moore's Technology adoption life cycle



Product Maturity: Mature or declining?

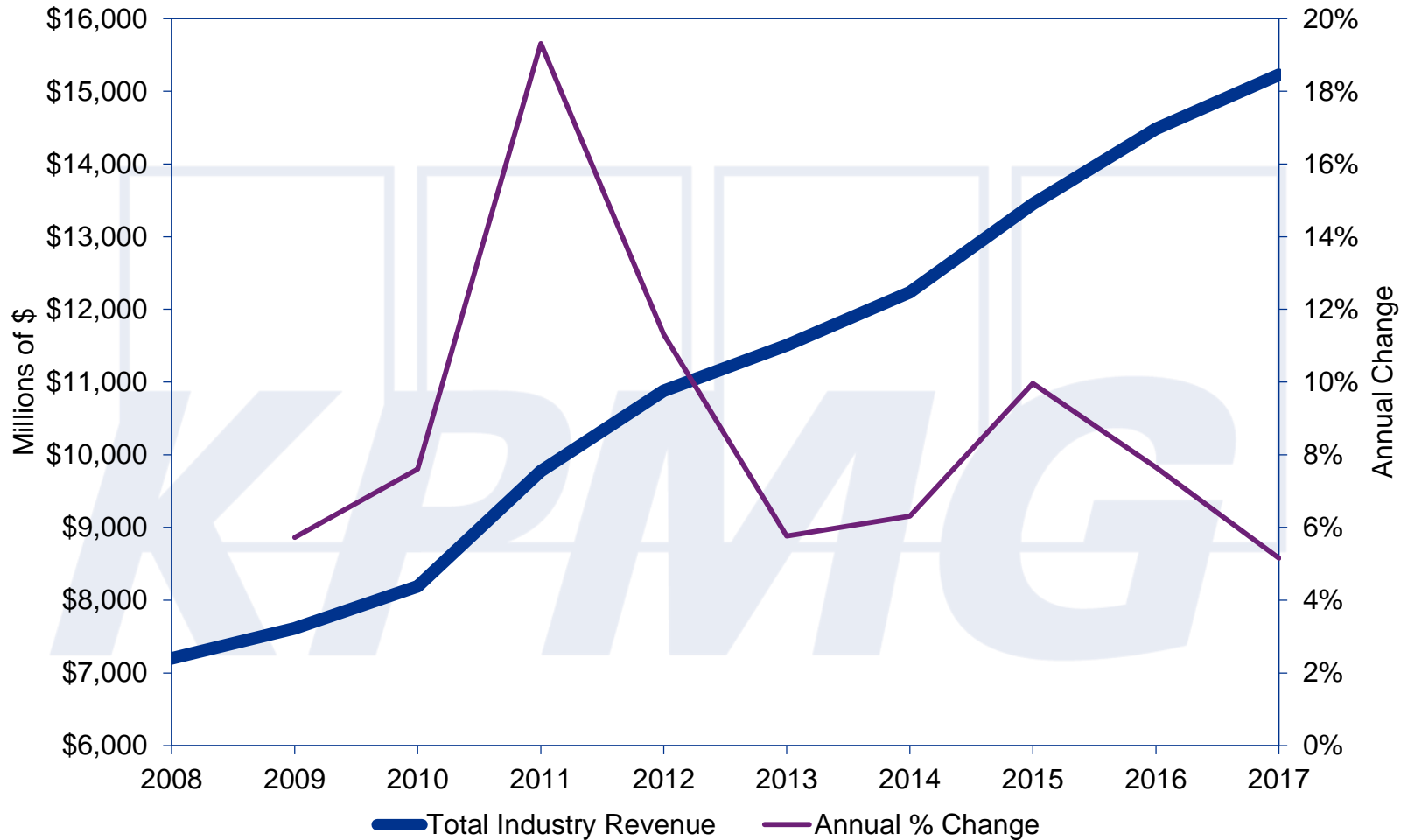
The four life cycle stages and their marketing implications



Based on "Characteristics of the product life cycle stages and their marketing implication" by Maximilian Classens, July 2017

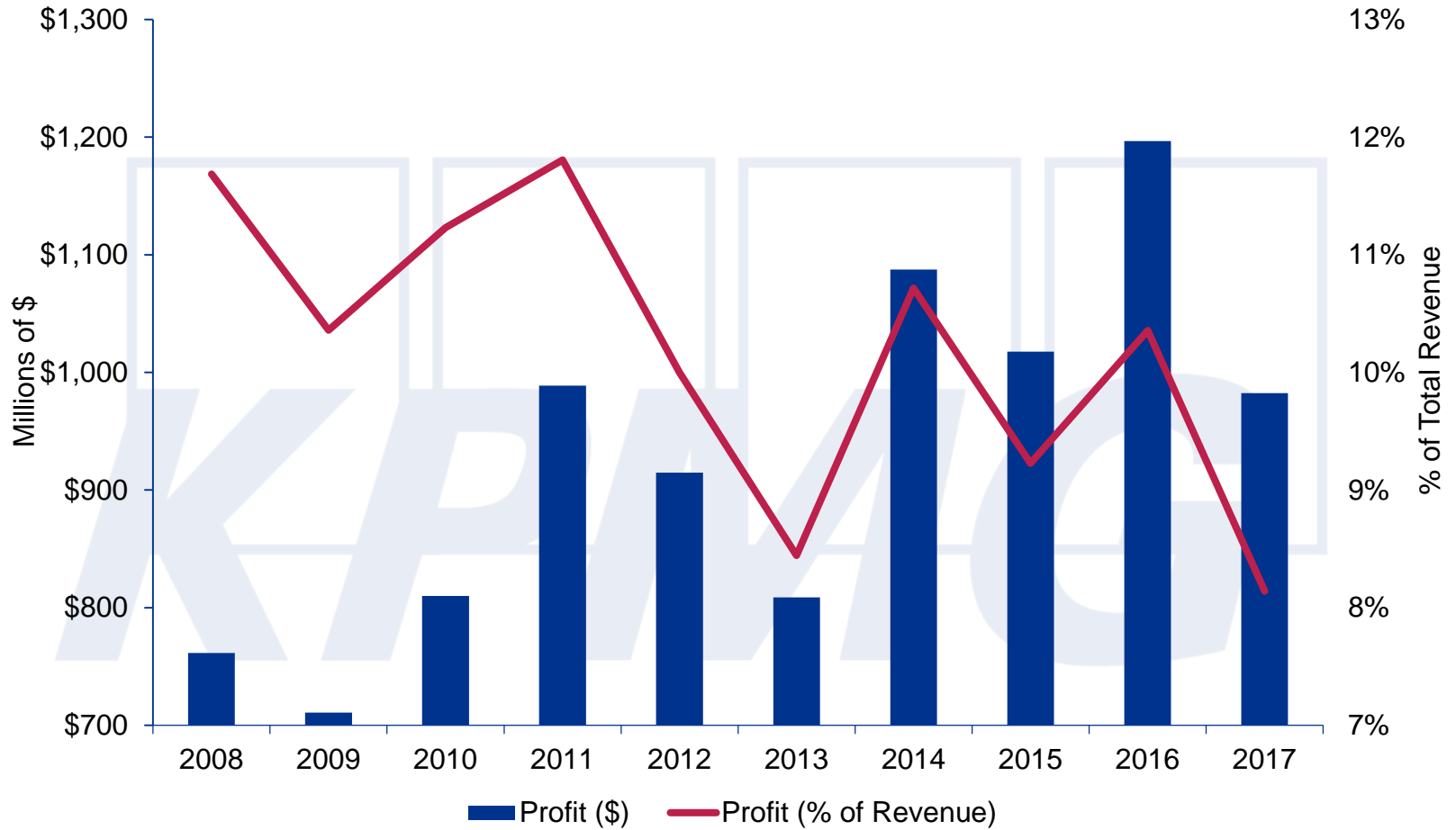


Sales: Peaking or falling?




Profits

High or falling?



Customer costs: Up or down?

“New Epic EHR Systems to carry lower prices, aimed at smaller hospitals”



“New, more minimalist versions of the Epic EHR system will feature **lower prices**, though also less functionality. And these will be aimed at smaller hospitals, according to Epic.

“New Epic EHR systems currently in development will come with lower price tags and will target smaller healthcare...”

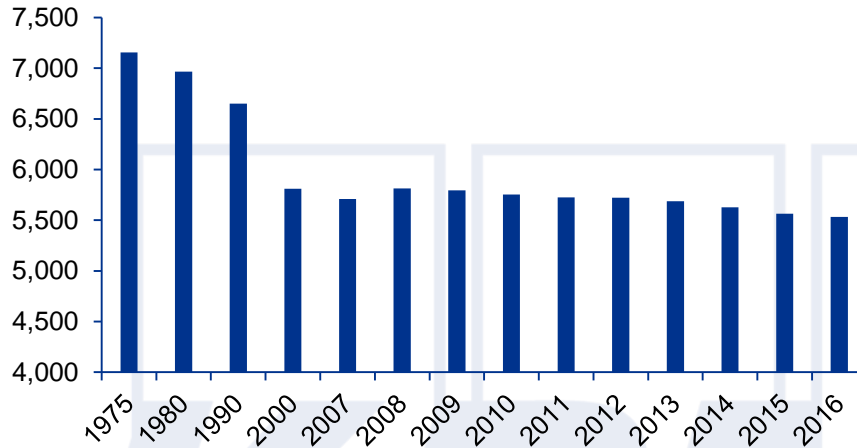
SearchHealthIT

Shaun Sutner

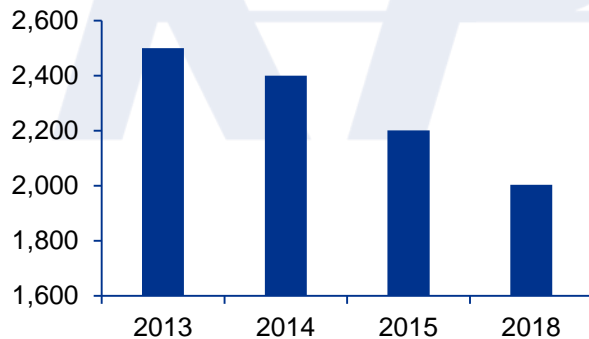
March 1, 2017

Customer base: Stable or declining?

US Acute Care Hospitals



US Health Systems



Hospital data from Statistica, Health system data from HIMSS Analytics

“For the first time ever, less than half of physicians are independent...”

—Modern Healthcare
May 31, 2017

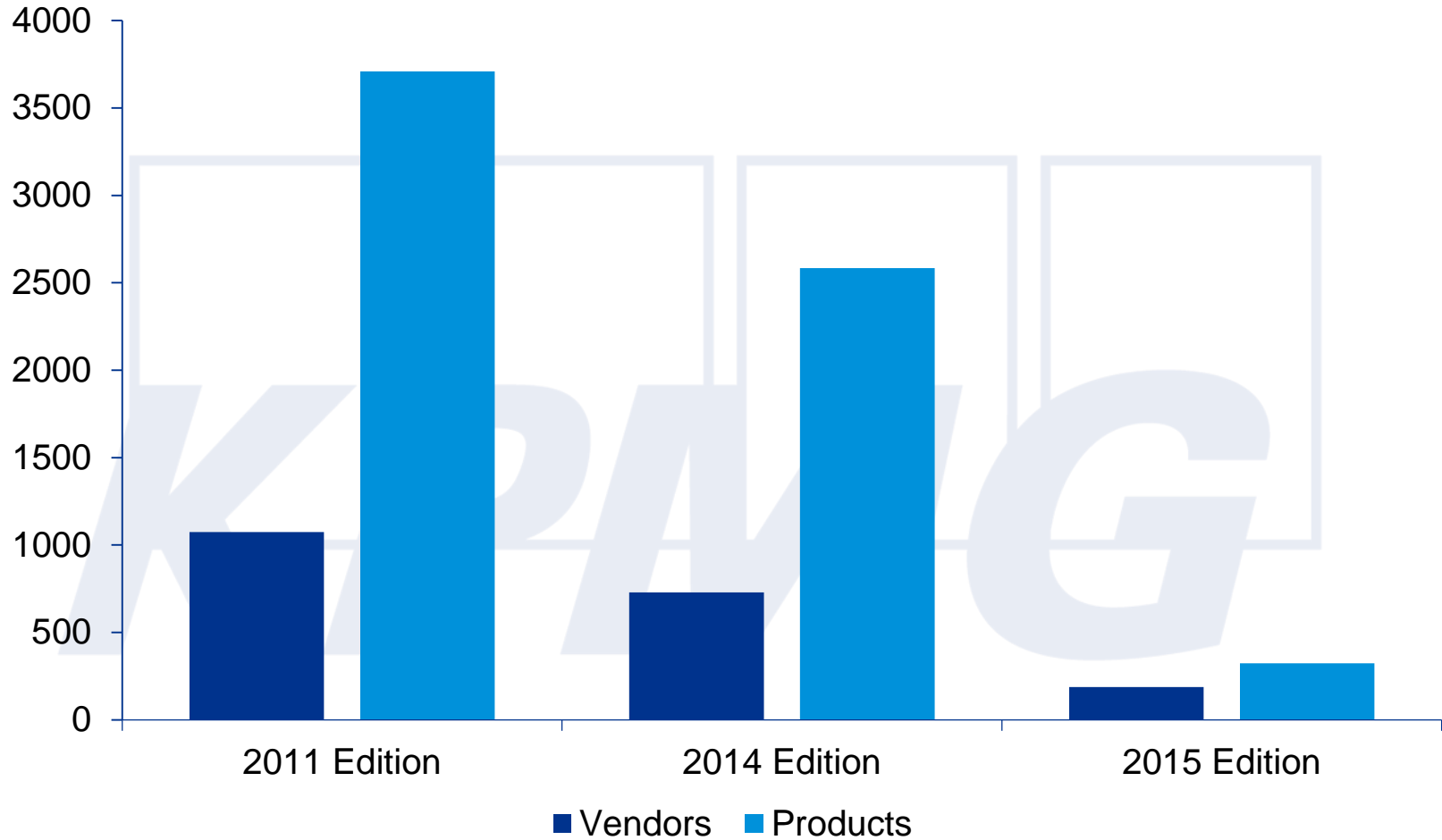
“6 Major Hospital Merger Deals Making Headlines in 2018”

—RevCycleIntelligence
January 4, 2018

“13 healthcare M&A deals that made headlines in 2017”

—FierceHealthcare
December 29, 2017

Competitors: Stable or declining?



Data Source: Office of the National Coordinator CHPL site

What to expect



The data suggests that the EHR market is in late maturity – approaching decline



Extrapolating behavior of other markets at similar junctures suggests potential future behaviors

- Continued consolidation – likely resulting in a stable duopoly
- Aggressive competition between surviving firms
- Lower prices – possibly leading to lower costs (for some)



Continual efforts to revert to “growth” or early maturity

- Incremental improvements touted as revolutionary
- Expansion of product and service breadth
- Expansion of product depth

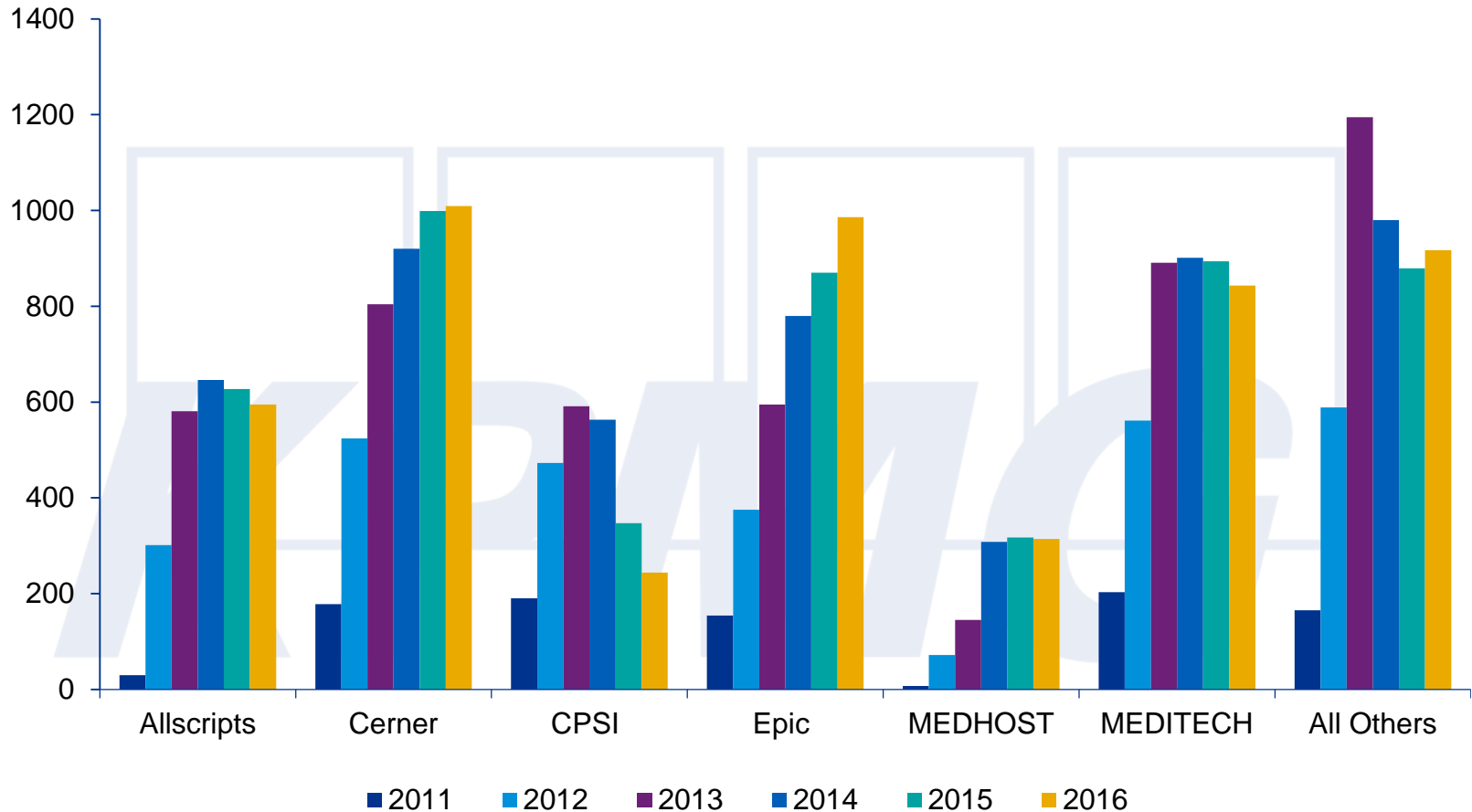


Seeking of New Markets

- Broadening of client markets
- Shift from U.S. to Global markets



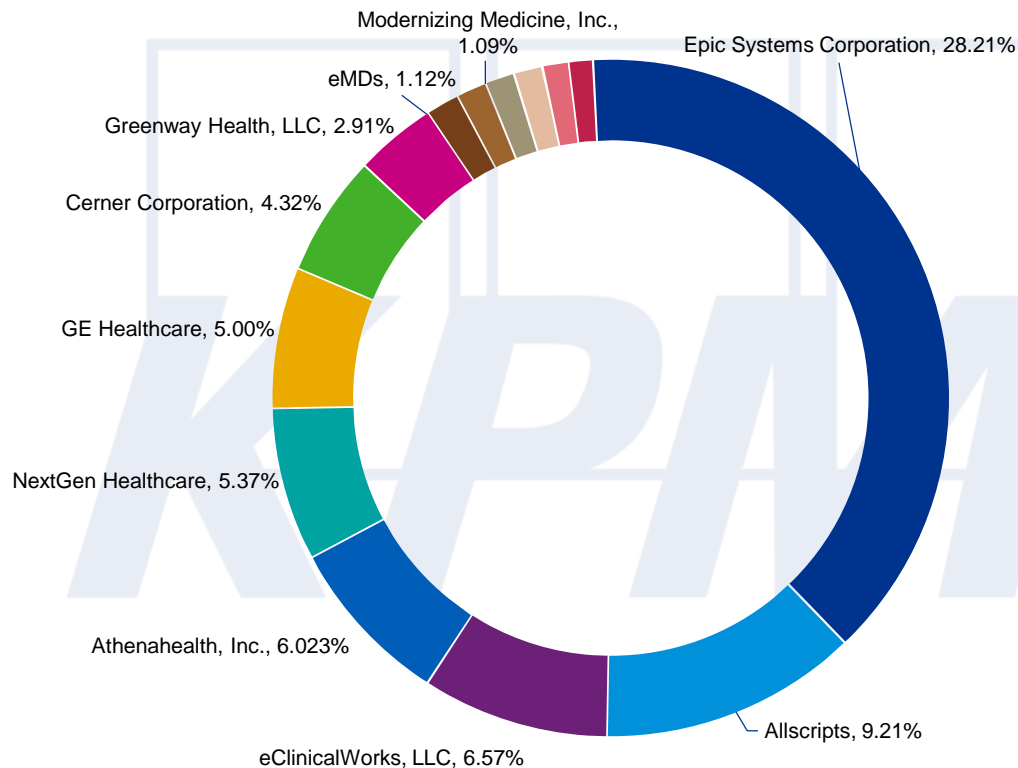
Eligible hospital meaningful use attestations by vendor



CMS Meaningful Use Public Data 1/19/2018

Leading ambulatory EHR Vendors

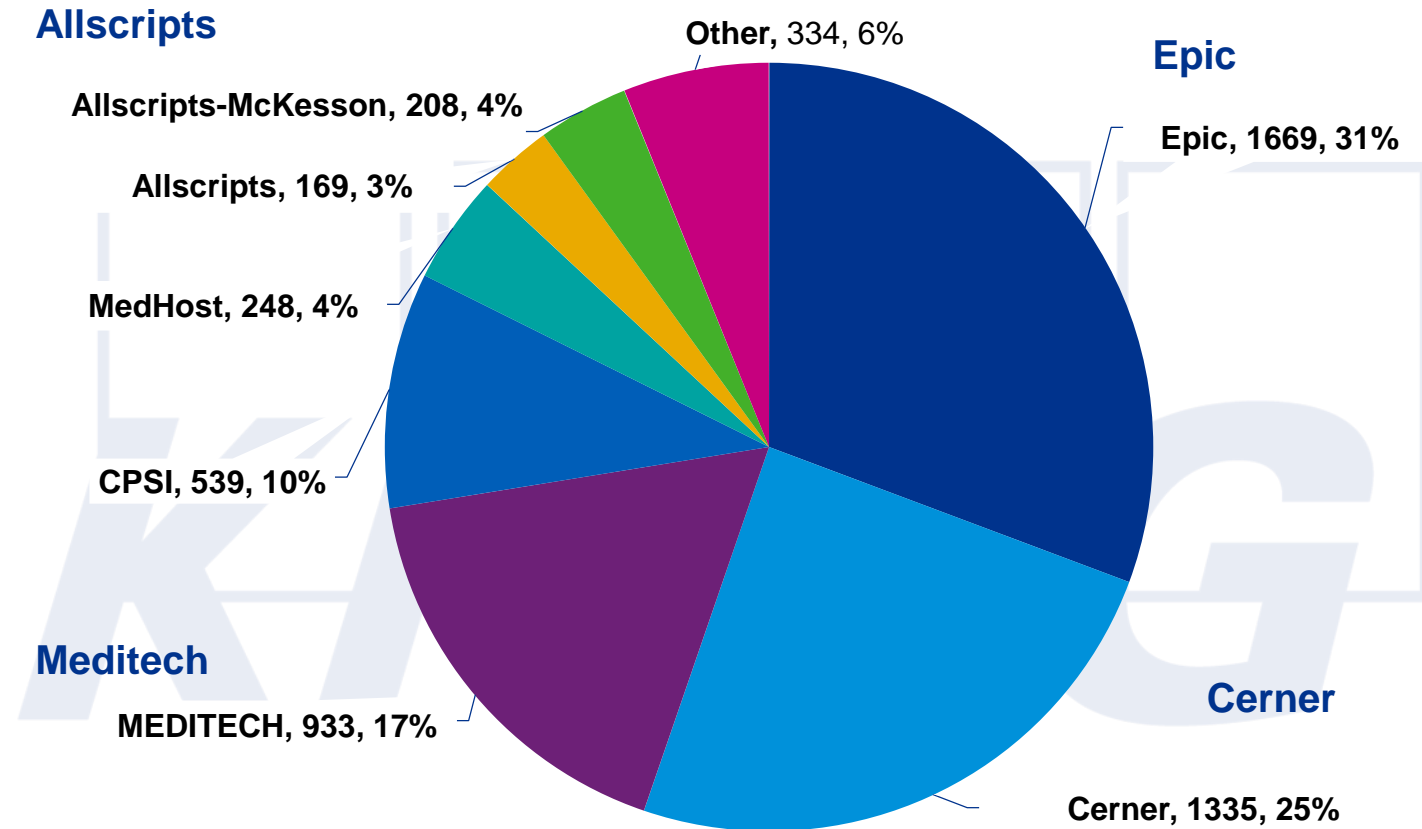
CMS publishes data on all Meaningful Use attestations, including the Certified Electronic Health Record Technology (CEHRT) used for each attestation. We extracted data on the 485,841 Eligible Provider (EP) attestations from 2016 (the most recent data available), eliminated duplicates, and calculated the percentage of EP attestations by EHR vendor. In total, this data includes 515 EHR products for ambulatory settings. The top 15 EHR vendors, listed here, represent 73% of all EP attestations. The top four products represent more than 50% of attestations.”



Vendor name	Vendor market share
Epic Systems Corporation	28.21%
Allscripts	9.21%
eClinicalWorks, LLC	6.57%
athenahealth, Inc.	6.03%
NextGen Healthcare	5.37%
GE Healthcare	5.00%
Cerner Corporation	4.32%
Greenway Health, LLC	2.91%
eMDs	1.12%
Modernizing Medicine, Inc.	1.09%
MEDENT – Community Computer Service, Inc.	1.03%
Integrated Practice Solutions, Inc.	1.03%
Practice Fusion	0.89%
McKesson	0.86%
SRS-Health	0.72%

Source: [EHR Products Used for Meaningful Use Attestation 2016 dataset](#), [CHPL 2014 and 2015 edition summary data](#)

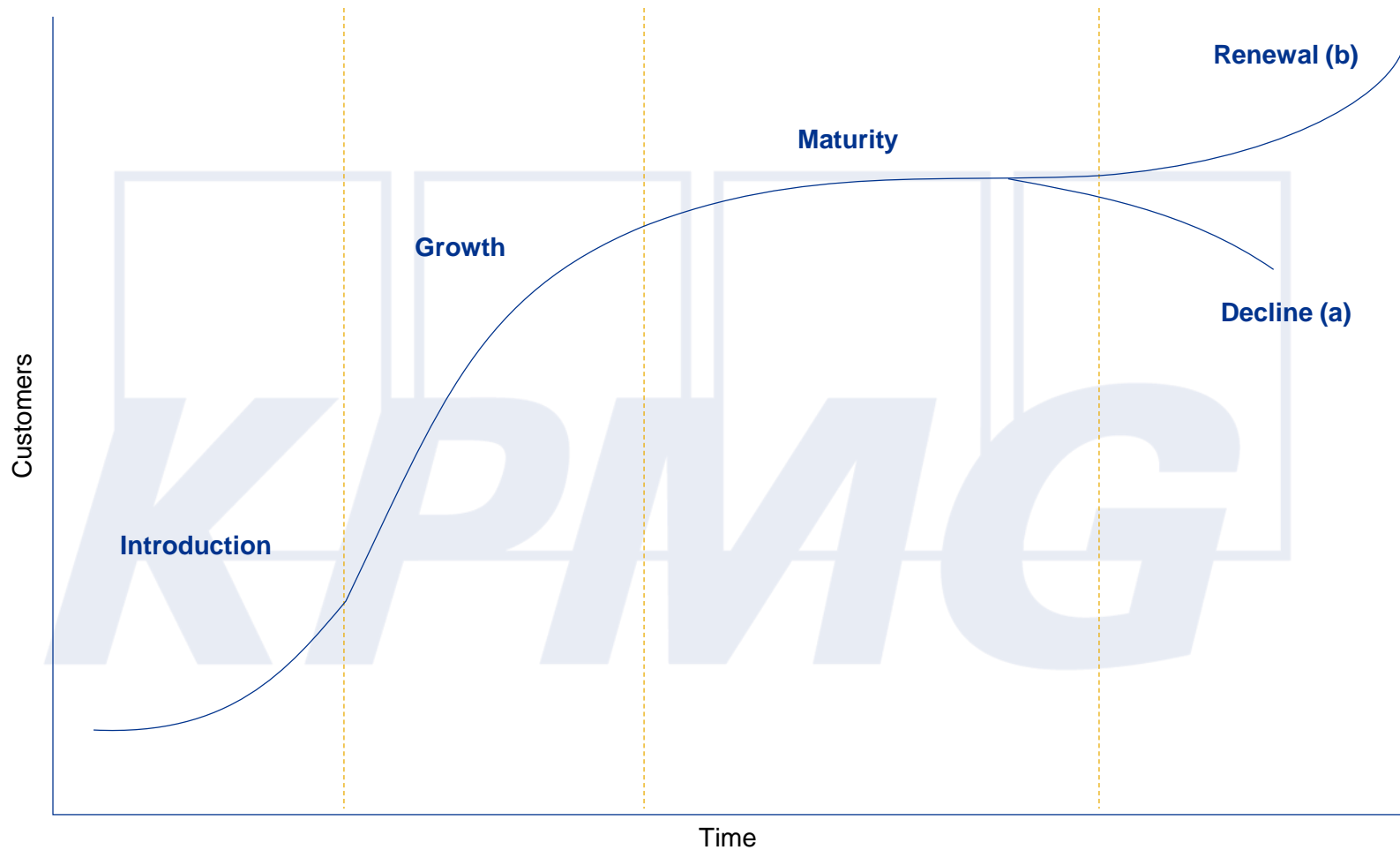
Hospital EHR Market share



HIMSS Analytics 1/8/2018



Continuous efforts to return to “Growth” phase



May 21, 2018 HealthcareITNews

“Next-gen EHRs: Epic, Allscripts and others reveal future of electronic health records

“EHRs will feature automation analytics, telemedicine, genomics and more in the not-too-distant future.”



“The industry needs an entirely new approach to the EHR. We’re seeing a huge need for the EHR to be mobile, cloud-based and comprehensive to streamline workflow and get smarter with every use.”

— **Paul Black**
Allscripts



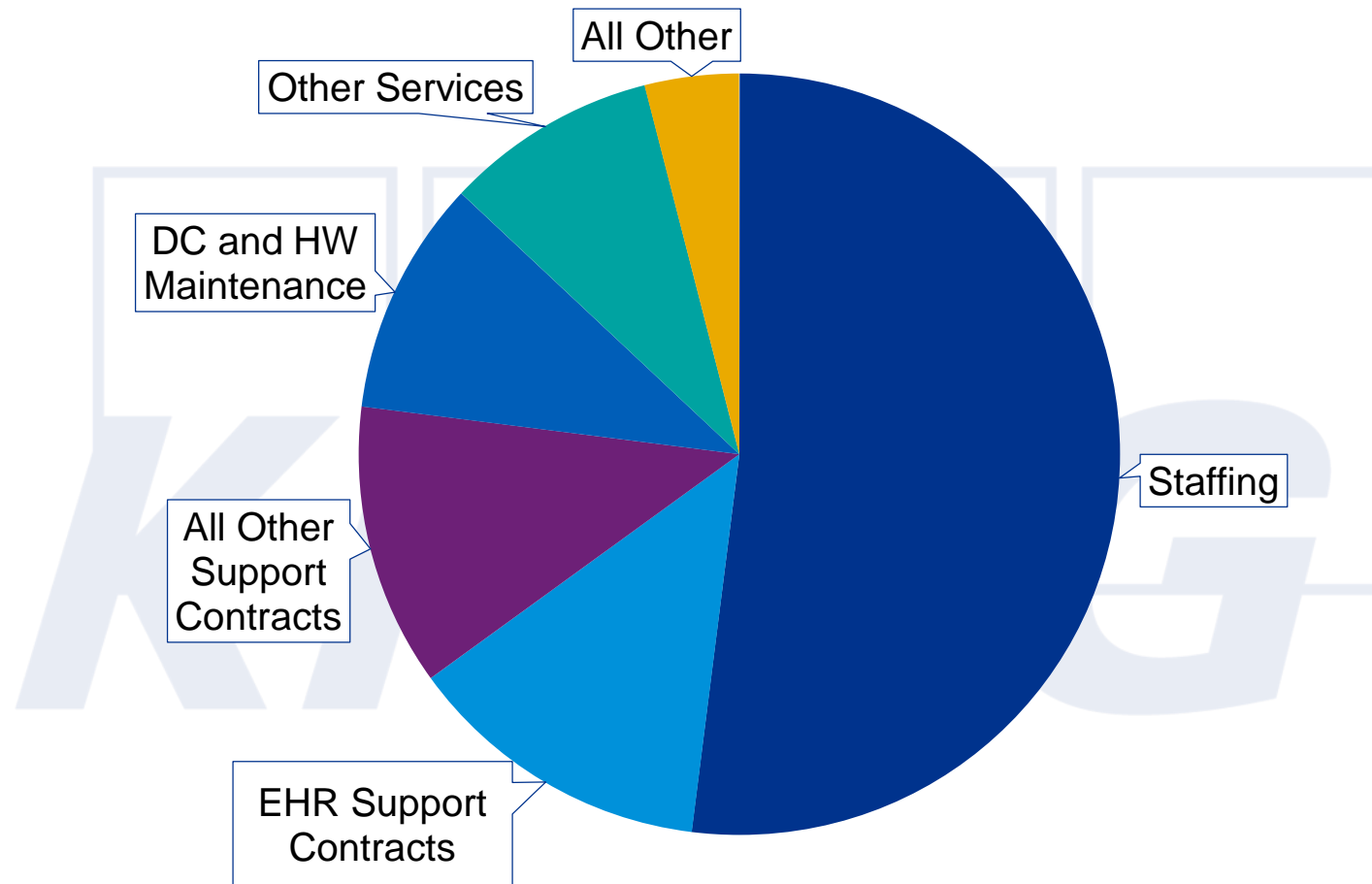
“The EHR is so last year”



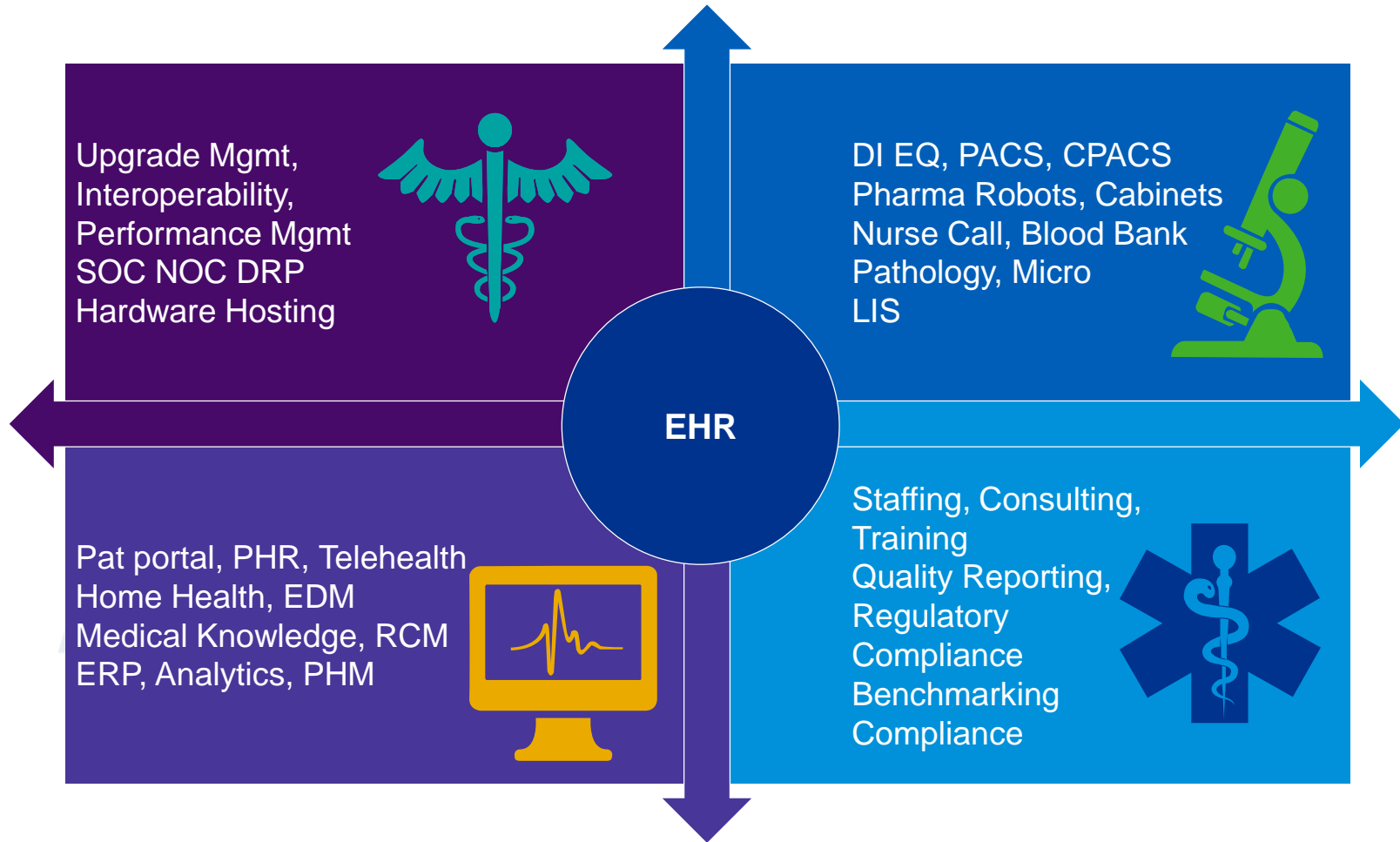
“ “The EHR is so last year,” Faulkner said. Now, the company is interested in a “comprehensive health record,” which includes information on diet, sleep, weather, crime, education, food access and more. In the future, this information will exist in a patient's record alongside the more traditional health data already there.”



Typical Healthcare provider IT budget



Broadening product and service breadth



A vendor listing of products their system replaces

Laboratory	<ul style="list-style-type: none"> — Duplicate patient identification — Anatomic Pathology <ul style="list-style-type: none"> - Autopsy - CAP synoptic reporting - Cytology - Histology - Surgical pathology — Clinical Lab <ul style="list-style-type: none"> - Chemistry - Handheld/PPID specimen collection - Hematology - Immunology - Microbiology - Quality control - Urinalysis — Critical results management - Management and productivity reporting - Molecular <ul style="list-style-type: none"> - Cytogenetics - Flow cytometry - Molecular genetics - Whole exome sequencing - Reference lab - Customer Relationship Management - EMR Connectivity: point-to-point and cloud-based - Orders and result management - Provider web portal 	<ul style="list-style-type: none"> - Non-patient transport - Patient movement - Patient transport - Temporary beds/rooms - Transfer center — Digital patient room name displays — Enterprise scheduling - Complex procedure/Multi-visit scheduling - Dialysis scheduling - Family and group scheduling - Inpatient scheduling - Open scheduling - Outpatient scheduling - Rehabilitation scheduling - Referral scheduling - Scheduling for translation services - Readmission risk (e.g. LACE) - Workload acuity — Assessment tools (e.g., FLAG/FLACC pain assessment, LATCH Breastfeeding documentation, Braden scale for pressure score risk, Silverman-Anderson index, growth charts, etc.) - Care plans - Clinical decision support - Clinical and Revenue Cycle improvement programs - Clinical calculations - Clinical quality measures - Clinical pathways - Dashboards - Forms - Flowsheets - Import utilities - Note templates - Oncology protocols - Registry configurations - Reports - Questionnaires - Order sets - Visit templates - Workflow build — Technical Components - Access logging - Audit trails - Incoming and outgoing interfaces - Security management - Standards-based interoperability - Clinical documentation improvement - User provisioning - Web service editor 	<ul style="list-style-type: none"> - Endocrinology/Diabetes - Endoscopy - ENT/Otolaryngology - Fertility - Gastroenterology - General surgery - Genetics - Geriatrics - Gynecology - Hematology - Infection control - Medical oncology - Molecular diagnostics and genomics - Nephrology - Neurology - Population Health - Accountable care organization (ACO) support - Activity tracker and app integration - Bulk orders - Care coordinator/manager support - Care gap identification - Care management - Clinically integrated network support - Community population health portal - Community resources directory and portal - Chronic care management support - Wellness program support - EHR-neutral population management and data exchange - Employer dashboards - Exception management - Multi-organization population management - MSSP and HCC dashboards and work flows - Patient outreach and engagement - Patient-centered medical home (PCMH) support - Performance monitoring - Preventive health programs - Provider scorecards - Population health - Quality reporting - Referral monitoring and management - Risk stratification - Registries - Social determinants of health — Telemedicine — Apple HealthKit and Google Fit Integration — Cross-organization telehealth — Distance care <ul style="list-style-type: none"> - Distance consult (provider to provider or provider/patient) — Home monitoring device integration — Remote ICU — Remote bed monitoring — Support for remote interpreters — Second opinion service — Addition services — Allergy/Immunology — Anti-coagulation — Antimicrobial stewardship — Behavioral services — Bone marrow transplants — General dentistry — Dermatology 	<ul style="list-style-type: none"> — Apple HealthKit and Google Fit Integration — Automated notifications to fill cancelled and open appointment slots - Care team information - Check-in/kiosk - Dining menus and meal ordering - Discharge instructions - Facility/appointment maps - Home/mobile patient portal - Bill pay - eCheck in - Earlier available appointment notifications - Health maintenance and disease management reminders - Lab results, medications, and immunizations - Patient reported outcomes (PRO) - Payment plans - Prescription renewal - Accountable care organization (ACO) support - Activity tracker and app integration - Bulk orders - Scheduling and appointment reminders - Surveys - Self-service estimates - Home monitor/wearable integration - Interactive Care Plan - Multi-EHR portal - Patient complaint system - Patient questionnaires - Portal for admitted patients - Portable personal health record (flash drive) - Proxy access - Self-service estimates - Video visits — Inpatient <ul style="list-style-type: none"> - Acute care reporting and Clinical Decision Support (CDS) - Advance Care Planning - Blood product administration - Care plans - Clinical Case Management - Clinical pathways - Clinical utilization management - Critical Care (ICU, NICU) - Critical Care (Remote Monitoring) - Discharge planning - Decision support - Emergency department information system - ED map views - ED Track Board - ED Triage - EMS (dependent on connectivity) - Flowsheets - Inpatient Electronic Medical Record - Inpatient pharmacy - Medication inventory management - Medication tracking (preparation and delivery) - Store and forward - Medication alerts - Medication repackaging and labels - Pharmacy reporting and decision support - Pharmacy interventions - Pharmacy clinical monitoring/Surveillance - Pharmacy point of sale - Infection control 	<ul style="list-style-type: none"> - Interactive nursing worklist - IV preparation system - Breast milk administration - Maternity/Labor and Delivery - Medication administration record - Narcotic reconciliation system - Pastoral care - Patient acuity management - Patient education - Pediatric conscious sedation - Point-of-care documentation - Rehabilitation - Physical Therapy - Occupational Therapy - Speech Therapy - Respiratory therapy - Restraint documentation - Risk scoring - Sedation documentation - TPN order management - Trauma doc/Code narrators - Unit whiteboard - 340b accumulators - Provider Mobility - Mobile apps for Apple Watch - Mobile apps for smart phones - Mobile apps for tablets - Mobile barcode medication administration - Mobile barcode specimen collection for nurses and phlebotomists - Mobile barcode blood product administration - Mobile Transport - Mobile radiology imaging documentation - Nurse rounding - Push notifications - Portable laptop system for home care and hospice - Secure chat - Web-enabled system for secure home or office PC access — Managed Care - Enrollment and benefits for providers - Chronic Disease Case Management for providers - Contract management - Enrollment and benefits for payers - Utilization review and chronic disease case management for payers - CAPTION receipt and reconciliation for payers - AP claims/Capitation - Marketplace support - Medicare advantage - Premium billing - Enterprise Billing - Hospital <ul style="list-style-type: none"> - Coding and reimbursement - APC grouping - Contract management - Contract modeling - Contract variance - Simple visit coding - Claims and remittance - Benefits management - Claims editor - Claims status checking 	<ul style="list-style-type: none"> - Denial management - Direct claims submission - Electronic remittance posting - Insurance follow-up management - Remittance reconciliation - Patient services and engagement <ul style="list-style-type: none"> - Customer relationship management/Call management - Financial assistance - Financial counseling - Patient cash collection and reconciliation - Patient estimates - Patient receipts - Patient statements - Payment plans - Payment propensity - Payment propensity* - Self-pay/Collections management - Specialty charging/billing - Emergency - Home health/Hospice - Bundled payments - Central Business Office (CBO) - CDM maintenance - Charge integrity - Management and Productivity Reporting - RAC audit tracking - Receivables management - Revenue recovery - Coding and reimbursement - Coding audit tools - Coding abstracting - Coding Edits - Coding audit tools - Compliance audit tools - Contract management - Contract variance - Physician level of service calculator - Claims and Remittance - Benefits management - Bundled payments - Claims editor - Claims status checking - Denial management - Direct claims submission - Electronic remittance posting - Insurance follow-up management - Remittance reconciliation - Patient services and engagement - Customer relationship management/call management - Financial assistance - Financial counseling - Patient cash collection and reconciliation - Patient estimates - Patient receipts 	<ul style="list-style-type: none"> - Patient statements - Payment plans - Payment Propensity - Self-pay/Collections management - Specialty charging/billing - Anesthesia - Denial - Radiology - Research - Reference Lab <ul style="list-style-type: none"> - General - Central Business Office - CDM maintenance - Payment plans - eCheck Payment Posting - Management and Productivity Reporting - RAC audit tracking - Receivables management - Revenue recovery - Workload/prioritization tools — Post-Acute and Home Care - Home health - Home health coding - Homecare drive time tracking - Homecare nurse and aide scheduling - Hospice - Medicare and general billing - Mileage calculator - Nursing Home (MDS) - OASIS registry and quality review - OASIS XML file extract - Off line clinical documentation - Post-acute rehabilitation - Skilled nursing facilities - Swing beds - Transitional Care Unit (MDS) — Research - Adverse event tracking* - Direct-to-patient recruitment - Encounter/Order association with research studies - Point-of-care recruitment - Portal for research patients - Patient research study tracking - Patient reported outcomes - Research consent tracking - Specialty-specific databases - Study administration - Study feasibility determination — Radiology - Interventional radiology - Peer review - Breast care information system — Cardiology - Cardiovascular information system - Cardiology registry submissions - ACC-MCDR - ACC-NCDR ICD - CathPCI - PINNACLE - Cardiology structured procedure documentation
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“Keep for now ...”

Laboratory	Ambulatory
— Blood bank	— Patient education content
— Courier management	Specialty Care
— Lab instrument middleware	— Nuclear medicine
— Point-of-care testing server	— Ophthalmology Image Management System
— Tissue bank	— Radiation oncology – record & verify system
Perioperative	Telemedicine
— Alarm solution	— Video Platform Vendor
— Blood gases	Patient Engagement
— Document imaging/scanning (high volume)	— Discharge instructions content
— 3D reconstruction software	— SMS Gateway
Technical Components	Inpatient
— Active directory	— Carousel medication inventory
— Biometric authentication	— Clinical device integration middleware
— End user help desk management	— Drug database
— Interface engine	— Fetal monitoring
— Smart card readers	— Food/Meal Management
— Single sign-on	— Medical information reference tool
— Telephony and fax	— Medical terminology (SNOMED)
Business Applications	— Medication robotics/ADS
— Budgeting	— Patient education content
— Donor Management and Fundraising	— Physician-friendly Dx (IMD)
— Employee Contact Information	— Robot assembly of IV syringes
— ERP	— Smart pumps
— Facility Maintenance Management	— ECG, EEG, EKG
— General Ledger	Enterprise Billing
— Gift Shop	— Credit Card Gateway
— Human Resources/Recruitment	— Encoder
— Kitchen Management	— Eligibility and Claims Clearinghouse
— Laundry	— Medicare Cost Reporting
— Learning Management	— OCE Edits
— Marketing	Research
— Materials Management	— Clinical Trial Management
— Non-pharmacy point of sale	Radiology
— Payroll	— PACS
— Staff Scheduling	Cardiology
— Time and Attendance	— CPACS
Patient Access	— Medical necessity content
— Medical necessity content	— Pacemaker Tracking
— RTLS/Rfid	— Hemodynamics & EP Reporting

“Related offerings”



Pharmacy

- Automated Dispensing Cabinets
- Retail Pharmacy
- Drug Database



Laboratory

- Cowpat
- Anatomic Pathology
- Helix
- Sequence
- Blood Bank
- HLA
- Microbiology
- Laboratory Outreach



Imaging

- CV Imaging Management
- ECG Management
- Care Aware Multimedia
- Camera Capture
- Image Sharing
- Skive PACS
- Radner RIS
- Radner Mammography
- Visual Desktop Integration
- Endoscopy Imaging



Other

- Skybox RFID
- Patient Kiosk
- HealtheLife

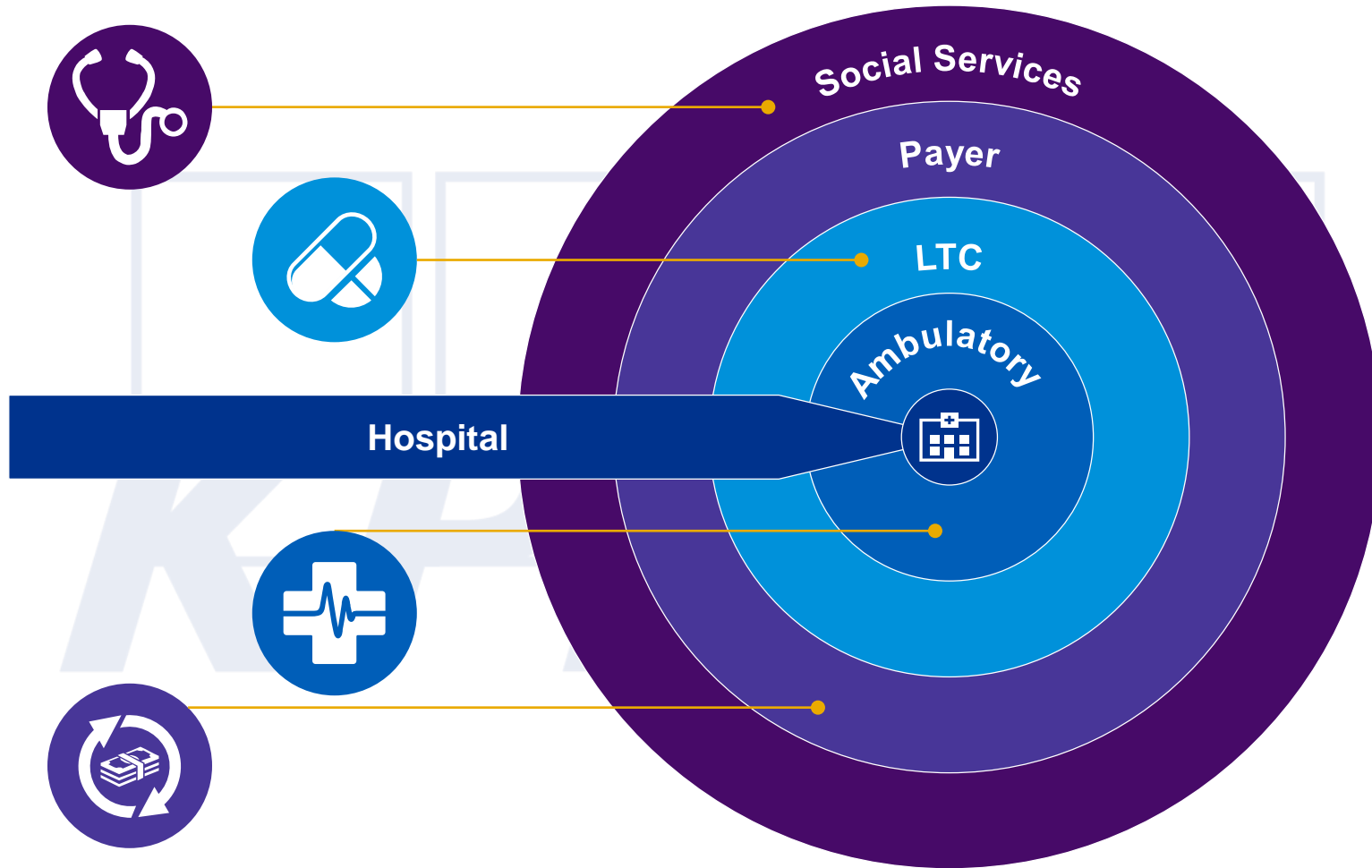


Clinical

- CareAware
 - Event Management
 - iBus
 - Connect
 - DeviceLink
 - VitalsLink
- Patient Observer
- Remote Patient Monitoring
- FetaLink
- CareTeam Communications
- Infusion Management



Broadening of client base



Client-base expansion

Cerner Continuum of Care

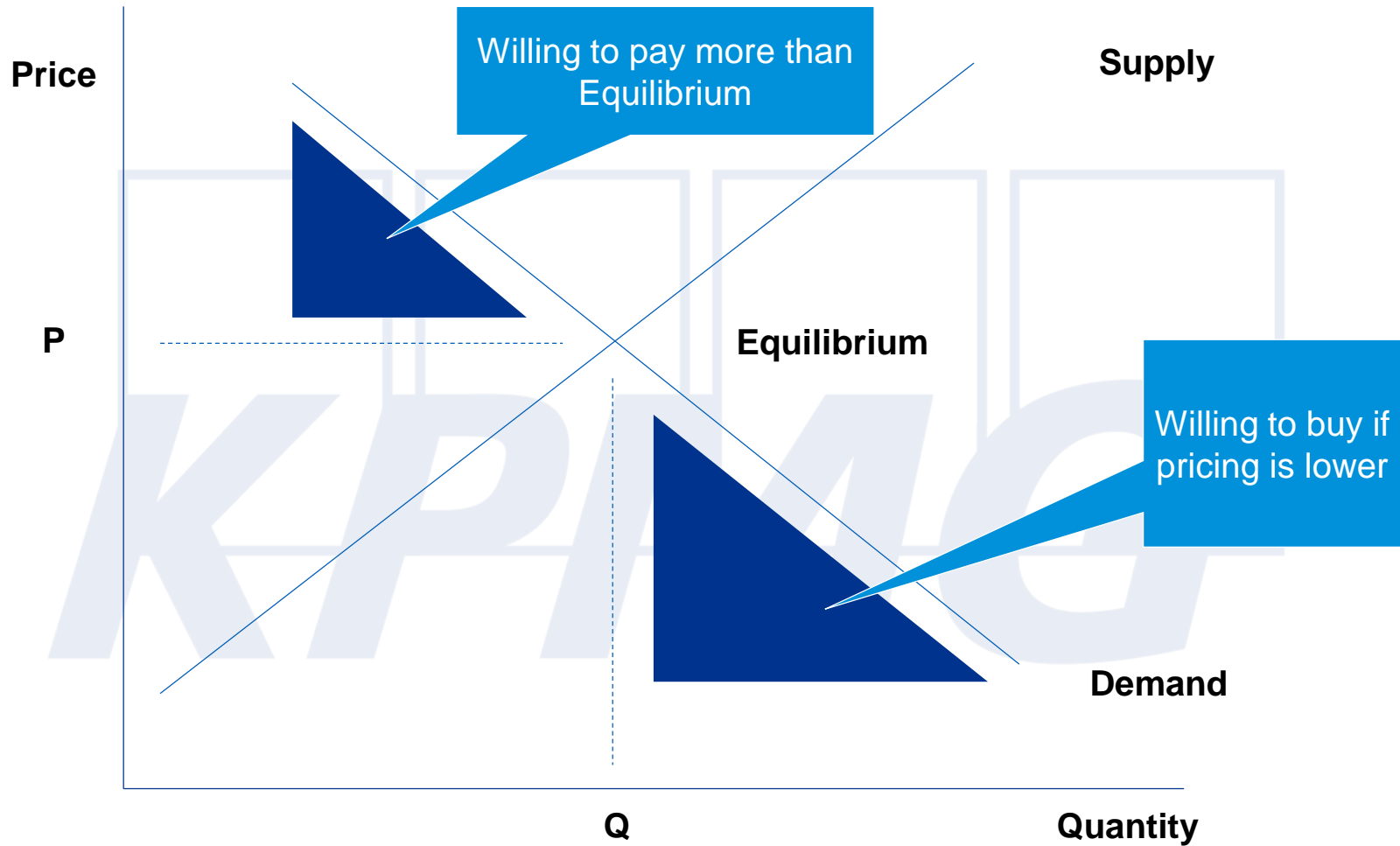
	Acute	Primary care	Behavioral health	Long-term care	Homecare and hospice	Rehab
Clinical Documentation	✓	✓	✓	✓	✓	✓
Revenue Cycle	✓	✓	✓	✓	✓	✓
Interoperable	✓	✓	✓	✓	✓	✓
Longitudinal EHR	✓	✓	✓	✓		✓
Longitudinal revenue cycle	✓	✓				✓

Epic Managed Care

Managed Care Manage your health insurance operations	
Enrollment and Eligibility	Customer Relationship Management
Portals for Providers and Member Services	Utilization Management
Care Management	Claims Adjudication and Premium Billing



Differentiated pricing strategy



eClinicalWorks Published pricing

Physician Practices	<i>EHR Only</i> \$449/mo. Per Provider <i>No Startup Costs</i>	<i>EHR with Practice Management</i> \$599/mo. Per Provider <i>No Startup Costs</i>	<i>RCM as a service</i> 2.9% of practice collections <i>No Startup Costs</i>
Hospitals	Starting at: \$599/bed/mo. <i>Includes maintenance, support and hosting. No up-front license fees.</i>		



Global EHR adoption rates

	NO DATA		NONE		UNDER 25%		25% TO 50%		50% TO 75%		75% TO 99%		100%		Row Totals		
	Countries	% World Pop	Countries	% World Pop	Countries	% World Pop	Countries	% World Pop	Countries	% World Pop	Countries	% World Pop	Countries	% World Pop	Pop (millions)	% World Pop	
Country per capita income level	Bottom Quarter	Afghanistan, Kenya, Mozambique, Nepal, North Korea, Sudan, Uganda, Yemen + 28 others	7%	Congo, Rwanda, Niger, Tanzania	2%	Bangladesh, Cambodia, Kiribati, Malawi, Tajikistan, Zambia	3%	Ethiopia	1%	Lesotho	0%				1,009	14%	
	Second lowest Quarter	Ecuador, Ghana, Honduras, Laos, Morocco, Nicaragua, Sri Lanka, Syria, Ukraine + 17 others	3%	Angola, Bosnia, Jamacia, Myanmar, Timor-Liste, Tunisia Vietnam	3%	Bolivia, El Salvador, Moldava, Nigeria, Uzbekistán	3%	Dominican Republic, India, Indonesia, Mongolia, Pakistan, Paraguay, Philippines	26%	Cabo Verde, Guatemala	0%	Albania	0%		2,589	35%	
	Second Highest Quarter	Algeria, Gabon, Libya, Macedonia, Mauritius, Serbia, Venezuela, + 9 others	1%	Iraq, Cuba	1%	Egypt, Lebanon, Argentina, Malaysia	2%	Azerbaijan, Belarus, Brazil, China, Iran, Jordan, Latvia, Mexico, Peru, South Africa, Turkmenistan	26%	Colombia, Costa Rica, Chile, Panama, Poland, Thailand, Poland	3%	Botswana, Bulgaria, Croatia, Montenegro, Hungary, Kazakhstan, Turkey	2%		2,556	35%	
	Highest Quarter	Andorra, Antigua, Bahamas, Brunei, Equatorial Guinea, Monaco, Seychelles	0%	Trinidad & Tobago	0%	Bahrain, Japan, Russia, Saudi Arabia, UAE	4%	Australia	0%	Greece, Kuwait, Lithuania, Malta, Spain	1%	Belgium, Canada, Czech Republic, France, Germany, Ireland, Italy, Portugal, Singapore, Slovakia, South Korea, Switzerland, USA + 7 others	9%	Austria, Denmark, Estonia, Finland, Iceland, Israel, Netherlands, New Zealand, Norway, Sweden, U.K.	2%	1,214	16%
	Totals		11%		6%		13%		54%		4%		11%		2%	7,368	100%

EHR Vendors Around the World

Vendor	Home Country	Major Markets
Agfa HealthCare	France	<i>World</i>
Allscripts/McKesson	USA	<i>USA, Europe</i>
Cerner	USA	<i>World</i>
Chipsoft	Netherlands	<i>Netherlands</i>
CSC/iSoft	USA/Australia	<i>UK</i>
Dedalus Healthcare Systems Group	Italy	<i>Italy, Middle East</i>
DXC	USA	<i>UK</i>
Epic	USA	<i>World</i>
Everis	Spain	<i>Spain</i>
Harris	Canada	<i>Canada, USA</i>
Hospital OS	Thailand	<i>Thailand</i>
HOSxP	Thailand	<i>Thailand</i>
Intersystems TrakCare	USA	<i>Australia, Asia-Pacific</i>
Medasys	France	<i>Europe</i>
MEDITECH	USA	<i>USA, Canada, South Africa</i>
MIMSYS Technologies	India	<i>India</i>
MV Soul	Brazil	<i>South America, Central America</i>
Napier	Singapore	<i>Singapore</i>
Neusoft	China	<i>China, USA</i>
NTT	Japan	<i>World</i>
Orion	New Zealand	<i>New Zealand</i>
Philips	Netherlands	<i>World</i>
WorldVISTA	USA	<i>World</i>

Today's global reach

Vendor A Office Locations

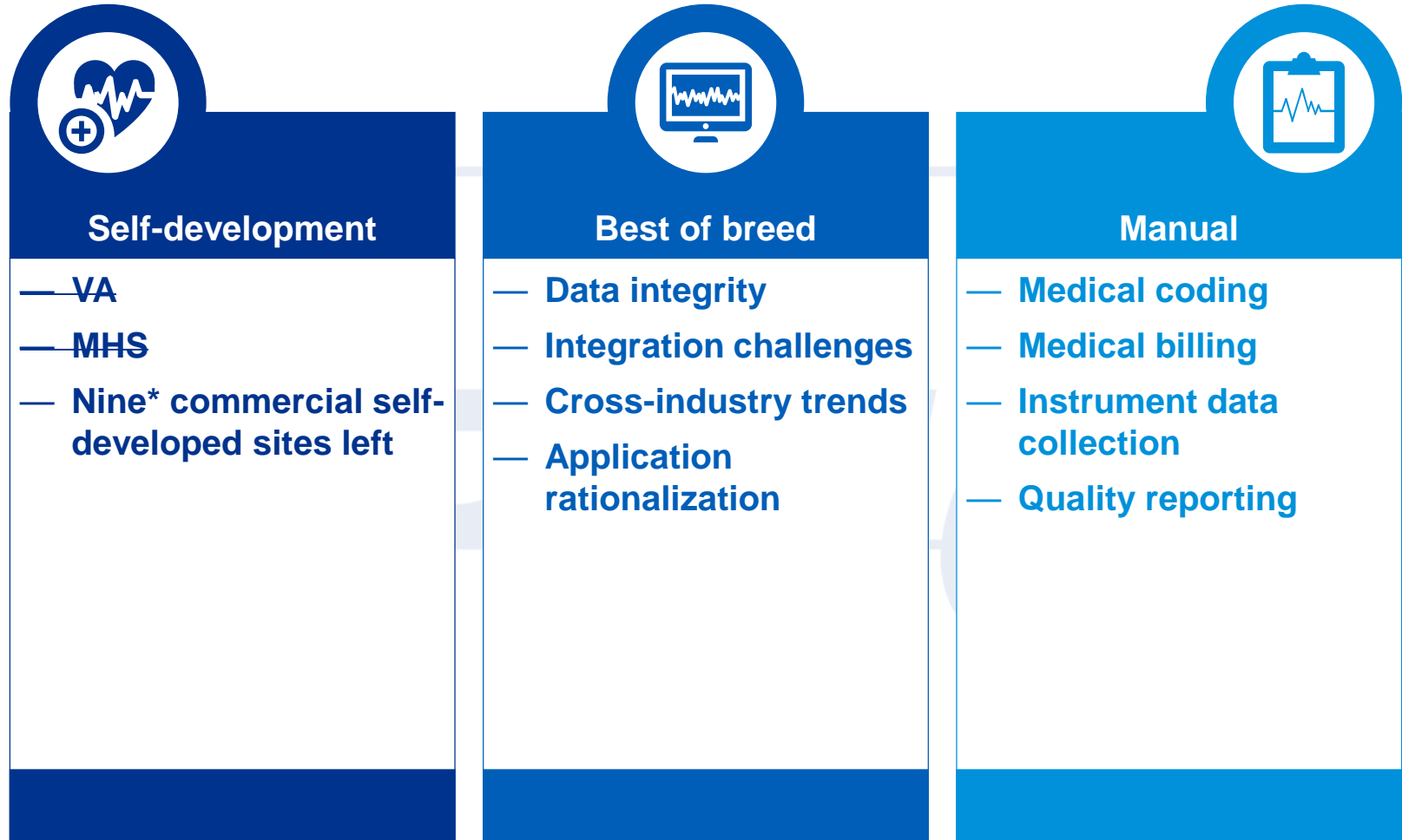
- Melbourne, Australia
- Copenhagen, Denmark
- Helsinki, Finland
- Den Bosch, Netherlands
- Al Khobar City, Saudi Arabia
- Singapore
- Dubai, United Arab Emirates
- Bristol, England, United Kingdom
- Verona, Wisconsin, USA

Vendor B Office Locations

- North Sydney, Australia
- Vienna, Austria
- Gmund, Austria
- Sao Paulo, Brazil
- Cairo, Egypt
- Paris, France
- Idstein, Germany
- Augsburg, Germany
- Berlin, Germany
- Erlangen, Germany
- Essen, Germany
- Hamburg, Germany
- St. Wolfgang, Germany
- Bangalore, India
- Dublin, Ireland
- Kuala Lumpur, Malaysia
- The Hague, Netherlands
- Singapore
- Oslo, Norway
- Doha, Qatar
- Riyadh, Saudi Arabia
- Madrid, Spain
- Stockholm, Sweden
- Abu Dhabi, United Arab Emirates
- Dubai, United Arab Emirates
- London, England, United Kingdom
- Kansas City, Missouri, USA



EHR substitutes



New entrants: Industry attractiveness(?)

Positive	Negative
Expanding Global Market	Declining U.S. Market
Customer demand for “better solution”	Customer switching costs
Regulatory protection	Entrenched incumbents
Low Customer Bargaining Power	Falling prices
Lower Supplier Bargaining Power	

	Cerner	SP500	Allscripts
Return on Assets	9.9%	7.7%	-0.3%
Return on Equity	19.9%	24.3%	2.2%
PE	32.1	25.6	1,309
Profit Margin	17.2%	9%	0.1%

Significant barriers to entry

Cerner's web site claims the firm has cumulatively invested \$6.3 billion in research and development

Customer switching costs are overwhelming

- Large healthcare systems can spend \$1 billion or more to change EHRs
- Moderate sized health systems (including some single hospital systems) spend \$100 to \$300 million to switch EHRs
- EHR implementations often span 2 or 3 years and are a major organizational distraction

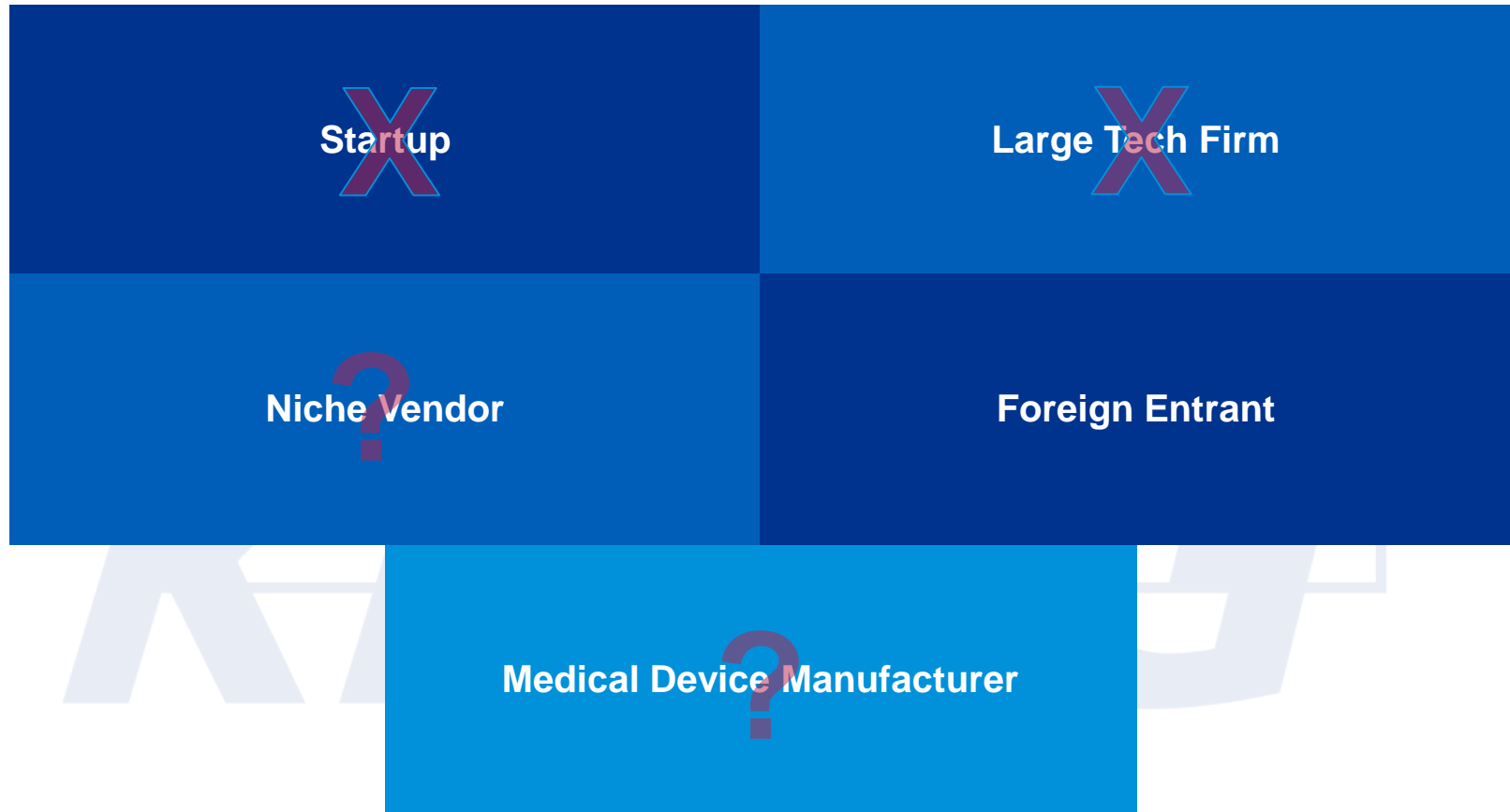
EHRs with large install bases produce very attractive network effects

- Ease of Interoperability
- Staff/new hire familiarity – reduced training
- Third-party products and services

Government Policy Support

- CEHRT standard
- CMS Billing Rules
- Veteran's Health and Military Health systems
- State university medical schools and systems

Where would a new entrant come from?





Conclusions

1 Stable Duopoly

↳ New Entrants unlikely

2 Attempts to Renew

3 Product and service expansions

↳ More of your IT budget goes to your primary vendor

4 Incremental improvements in features and functions

↳ But nothing revolutionary – at least not all at once

5 Lower prices – and lower costs (for some)

6 Shift in focus to global markets





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