



## Organized Providers

### Integrated Delivery Networks: Profiles of Industry-leading IDNs and the Access & Partnership Landscape

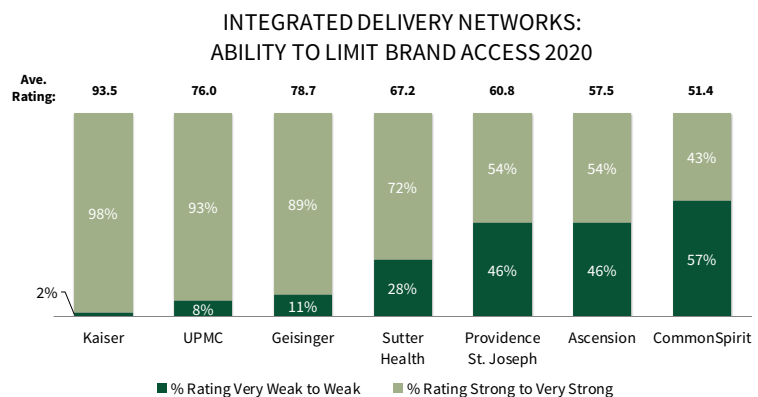
Effective engagement with integrated delivery network (IDN) accounts is imperative as these organizations' role in the market access landscape continues to increase. HIRC's report, *Integrated Delivery Networks: Profiles of Industry-leading IDNs and the Market Access & Partnership Landscape*, provides manufacturers with key resources to assist in account planning for select industry-leading integrated delivery network accounts. The following questions are addressed:

- What is the size (sites of care, patient volume, number of physicians and employees), financial performance, landscape of risk-bearing entities/activities, and pharmacy operations of 20 of the top IDNs?
- What is the notable recent market activity and specific strategic imperatives of 20 industry-leading IDNs?
- Which integrated delivery networks are rated by manufacturers as most able to limit brand access, and why? Which integrated delivery networks are rated as most willing to partner with pharmaceutical firms?

**Key Finding:** Kaiser is rated by pharmaceutical manufacturers as strongest in its ability to limit brand access due to its high control over physician prescribing behavior and closed system; Geisinger is rated most willing to partner.

### Access & Partnership Landscape Reveals Opportunities to Partner with High Access-Impacting IDNs

Respondents representing top mid-size, large, and very large pharmaceutical firms were asked to consider and rate six select industry-leading IDNs in their ability to limit brand access and willingness to partner. Kaiser is rated strongest in ability to limit access, followed by UPMC and Geisinger, due to these organizations' high level of control over prescribing and structures characterized by close integration of payer and provider.



UPMC and Geisinger, however, are also rated as most willing to partner on mutually beneficial initiatives. These organizations seek and/or show interest in discussions and are willing to consider innovative partnership ideas.

## Top Integrated Delivery Network Accounts Profiled

IDN profiles provide key metrics useful for account teams and planning, such as IDN size metrics, status of risk-bearing activities/entities (e.g., IDN-owned health plan, ACO), pharmacy operations, and financial performance. Profiles also review recent notable market activity for key accounts and the organization's strategic imperatives. HIRC's selection of industry-leading IDNs is based upon a combination of overall size, captive health plan membership, and regional impact. In-depth profiles of the following organizations are provided:

IDN Name	Headquarters	IDN Name	Headquarters
Ascension Health	St. Louis, MO	Mercy	Chesterfield, MO
Advocate Aurora Health	Downers Grove, IL & Milwaukee, WI	NYC Health + Hospitals	New York, NY
Baylor Scott & White Health	Dallas, TX	Northwestern Medicine	Chicago, IL
Bon Secours Mercy	Cincinnati, OH	Partners Healthcare	Boston, MA
CommonSpirit Health	Chicago, IL	Providence St. Joseph Health	Renton, WA
Geisinger Health System	Danville, PA	Sentara Healthcare	Norfolk, VA
HealthPartners	Bloomington, MN	Sharp HealthCare	San Diego, CA
Henry Ford Health System	Detroit, MI	Spectrum Health	Grand Rapids, MI
Intermountain Healthcare	Salt Lake City, UT	Sutter Health	Sacramento, CA
Kaiser Permanente	Oakland, CA	UPMC	Pittsburg, PA

## Research Methodology and Report Availability

In January, HIRC surveyed 61 respondents representing 26 pharmaceutical firms. Online surveys were used to gather quantitative and qualitative information regarding the access and partnership landscape. Information for IDN profiles is derived by in-depth secondary research and IDN panelist surveys when possible. The full report, *Profiles of Industry-leading IDNs and the Market Access & Partnership Landscape* is part of the Organized Providers Service, and is now available to subscribers at [www.hirc.com](http://www.hirc.com).

The **Organized Providers Service** examines the environmental trends impacting health care delivery, focusing on how increased provider accountability and value-based reimbursement will impact pharmaceutical market access. HIRC's research with integrated delivery networks (IDNs) provides market insights and metrics to assist pharmaceutical firms in developing access strategies and quality value-added programs. For subscription information please contact:



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HEALTH INDUSTRIES RESEARCH CENTER (HIRC) is an independent, nonpartisan organization that conducts strategic market research on trends in health care, pharmaceuticals and managed care businesses. HIRC's benchmark studies focus on the marketing needs of pharmaceutical companies by providing research critical to the development of successful customer-focused marketing strategies.

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