



Organized Providers

Integrated Delivery Networks: Manufacturer Account Engagement and Competitive Positioning

As integrated delivery networks (IDNs) increasingly seek to provide more coordinated and outcomes-driven care, manufacturers are being challenged to move beyond tactical engagement and more closely support system priorities. HIRC's report, *Integrated Delivery Networks: Manufacturer Account Engagement and Competitive Positioning*, reviews manufacturer presence with IDN accounts as well as IDNs' Partners of Choice and relational status ratings. The report addresses the following questions:

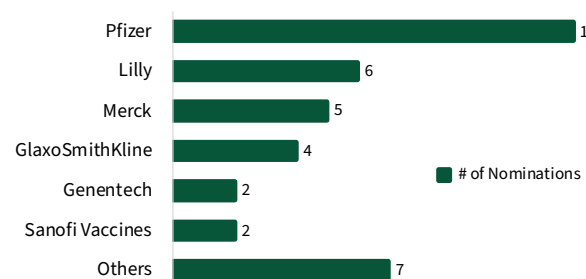
- What level of access do key pharmaceutical manufacturer personnel types (e.g., account manager, sales rep, MCSL) have to IDN decision-makers?
- Which pharmaceutical manufacturers have the highest presence with IDN accounts?
- Which manufacturers do IDN decision-makers select as their overall "Partner of Choice"? What key factors drive panelist selections?
- How do IDNs rate their relational status with ~30 manufacturers, from distant/tactical to collaborative/strategic?
- How can manufacturers drive towards more collaborative or strategic relationships with IDNs?

Key Finding: Advancing beyond tactical engagement requires alignment with IDN priorities and enterprise-level collaboration. Strategic relationships develop through sustained partnership and long-term engagement rather than product-driven interactions.

Pfizer Retains its Position as the Clear Manufacturer “Partner of Choice” Among IDN Decision-makers

IDN decision-makers were asked to nominate a single pharmaceutical manufacturer as their overall Partner of Choice. **Pfizer** is the clear leader with 13 nominations, maintaining its leadership position for the last 3+ years. IDNs recognize Pfizer's high-performing account teams, responsiveness, and strong MCSL support, combined with a broad product portfolio that makes the company strategically relevant across multiple therapeutic areas.

INTEGRATED DELIVERY NETWORKS: 2026 TOP PARTNERS OF CHOICE

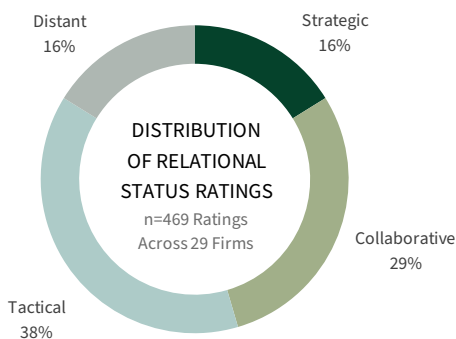


7 Additional Manufacturers Receive 1 Nomination Each

Lilly, Merck, and GSK round out IDNs' top Partners of Choice for 2026. The complete report reviews the full list of manufacturers nominated and the factors driving nominations.

Relational Status Ratings for ~30 Manufacturers

IDN executives were asked to consider and rate pharmaceutical manufacturers based on their relational status from distant, tactical, collaborative, to strategic. Overall, IDN key decision-makers rate 16% of relationships as strategic, 29% as collaborative, 38% as tactical, and the remaining 16% as distant. Longitudinal data suggest that relationships are becoming more execution-focused and selectively strategic rather than broadly collaborative.



LEADERS IN % of STRATEGIC/COLLABORATIVE RELATIONSHIPS WITH IDNs:

Very Large Firms

Genentech, Pfizer, Lilly

Large Firms

Gilead, Sanofi, GlaxoSmithKline

Mid-Size Firms

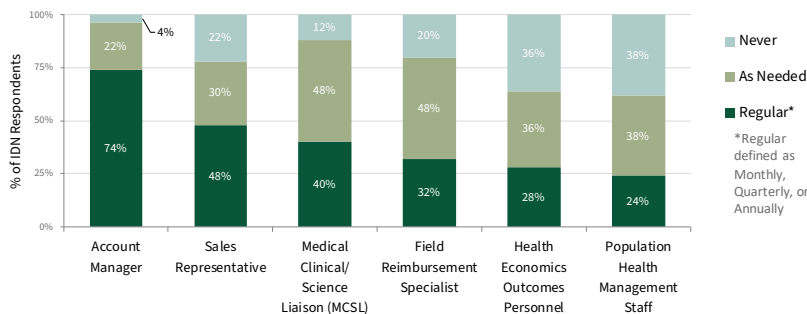
Alnylam, Bayer, Madrigal, Sanofi Vaccines

In 2026, **Genentech, Pfizer, and Lilly** lead the Very Large size cohort in its percentage of strategic and collaborative relationships with IDNs. **Gilead, Sanofi, and GSK** lead the Large firm cohort, and **Alnylam, Bayer, Madrigal, and Sanofi Vaccines** lead among Mid-size firms.

Key Account Managers Have Greatest "Regular" Access to IDN Decision-Makers

IDN executives report that they most frequently interact with pharmaceutical manufacturer account managers and sales representatives on a regular basis (monthly, quarterly, or annually), while technical personnel (MCSLs, FRMs, HEOR, population health roles) are most often seen on an "as needed" basis.

FREQUENCY OF CONTACT WITH PHARMACEUTICAL MANUFACTURER PERSONNEL BY ROLE TYPE



Research Methodology and Report Availability

In December 2025, HIRC surveyed 50 IDN pharmacy directors and senior leaders. Online surveys and follow-up telephone interviews were used to gather information. The full report, *Integrated Delivery Networks: Manufacturer Account Engagement and Competitive Positioning* is part of the Organized Providers Service, and is now available to subscribers at 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:



Karen Ernst
Research Director
408-884-8560
kernst@hirc.com

hirc

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.

224 Walnut Avenue, Suite C
Santa Cruz, California 95060
P: 408-884-8560 • F: 408-884-8561

www.hirc.com