



## Organized Providers

### Integrated Delivery Networks: Market Landscape and Strategic Imperatives

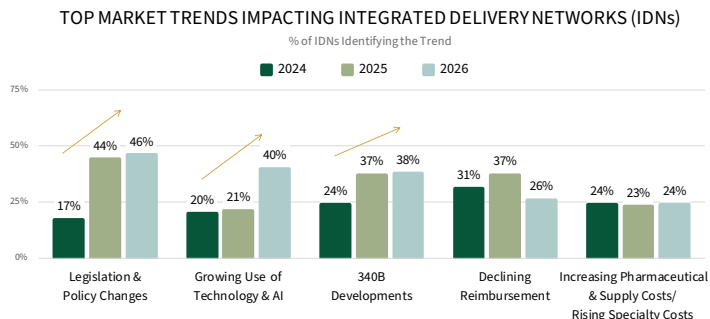
As financial pressure, policy uncertainty, and technology disruption converge, IDNs are rapidly reshaping their operational, pharmacy, and care delivery strategies in 2026. HIRC's report, *Integrated Delivery Networks: Market Landscape and Strategic Imperatives*, provides a market overview of IDNs/systems, including recent market activity, the top trends driving IDN strategy, the status of IDN risk-bearing activities, and more. The following questions are addressed:

- What is the **latest news & market activity** in the IDN/health system segment?
- What is the status of **merger & acquisition** activity, including private equity investment in health care and trends in physician employment (independent vs. systems)?
- Which **market trends** are driving IDN decision-making and overall strategy?
- What are IDN decision-makers' **most urgent strategic imperatives** to address as they adjust to a complex and dynamic market landscape?
- What is the status of IDN/systems' **risk-bearing activities**, such as health system-owned health plans, direct-to-employer contracts, and participation in government and commercial value-based payment model programs?
- What is the scope of IDNs' **home health, pharmacy, and alternate site infusion** capabilities? What is the status of IDN/health system-owned **specialty pharmacies**?

**Key Finding:** With margin pressure intensifying, IDNs in 2026 are prioritizing cost reduction, operational efficiency, AI-enabled automation, and ambulatory expansion to preserve financial stability and improve care delivery.

### IDNs Increasingly Identify Legislation & Policy, Technology/AI, and the Future of 340B as Top Disruptive Trends

Most top of mind for IDN business leaders for a second year in a row is the legislation and policy environment, particularly the Inflation Reduction Act and Medicaid cuts, as well as the policy issues that can impact reimbursement, such as site neutrality and 340B reform. IDNs also increasingly mention the growing use of technology and artificial intelligence (AI) in health care.



The full report provides the complete listing of most impactful market trends and a deep dive into the top trends identified by panelists.

## Total Cost of Care Remains a Top Driver of IDN Leadership Decision-Making

IDNs' top strategic imperatives in 2026 include reducing the total cost of care and enhancing technology capabilities/automation/AI, followed by three additional key priorities. The simultaneous pursuit of cost reduction, technology adoption, operational efficiency, and ambulatory expansion suggest a key underlying goal: do more with less as financial headwinds intensify.

IDNs TOP STRATEGIC IMPERATIVES, 2026	
Strategic Imperative	% of IDNs
Reduce the Total Cost of Care	34%
Enhance Technology Capabilities/Automation/AI	28%
Enhance Operational Efficiency	24%
Increase Patient Access to Care in Ambulatory, Specialty Service Lines, and Home Health	22%
Address Workforce Challenges	22%

The complete listing of IDNs' strategic imperatives are examined in the full report as well as results of in-depth follow-up interviews with IDN leaders on these topics.

## Comprehensive View of the IDNs/Systems Market Environment

From IRA pricing reforms and 340B uncertainty to AI adoption and site-neutral payment pressure, IDNs are navigating a highly disruptive market environment. This comprehensive resource explores how health systems are responding to ongoing market, policy, and competitive pressures with a close examination of evolving health system strategy, including value-based care, specialty pharmacy expansion, direct-to-employer contracting, technology, and more.

KEY THEMES EXPLORED, 2026			
Market Environment	Trend Deep Dive	IDN Risk-bearing	IDN Services
Recent Market Activity	Legislation & Policy	Health System-owned Health Plans	Home Health Care
Merger & Acquisition Activity	Technology & AI in Health Care	Direct-to-Employer Contracting	Virtual Hospital/Hospital-at-Home
Private Equity in Health Care	340B & Other Reimbursement Issues	Government & Commercial VBC Programs & Participation	Alternate Site Infusion & Specialty Pharmacy

**Why does this matter to manufacturers?** As IDNs navigate increasing financial and operational strain, manufacturers that align with health system priorities around efficiency, access, and total cost of care will be better positioned to build strategic partnerships.

## Research Methodology and Report Availability

In December and January, HIRC surveyed 50 IDN senior leaders and pharmacy and medical directors. In-depth secondary research, online surveys, and follow-up telephone interviews were used to gather information. The full report, *Integrated Delivery Networks: Market Landscape and Strategic Imperatives* 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:



Karen Ernst  
Research Director  
408-884-8560  
[kernst@hirc.com](mailto:kernst@hirc.com)



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](http://www.hirc.com)