

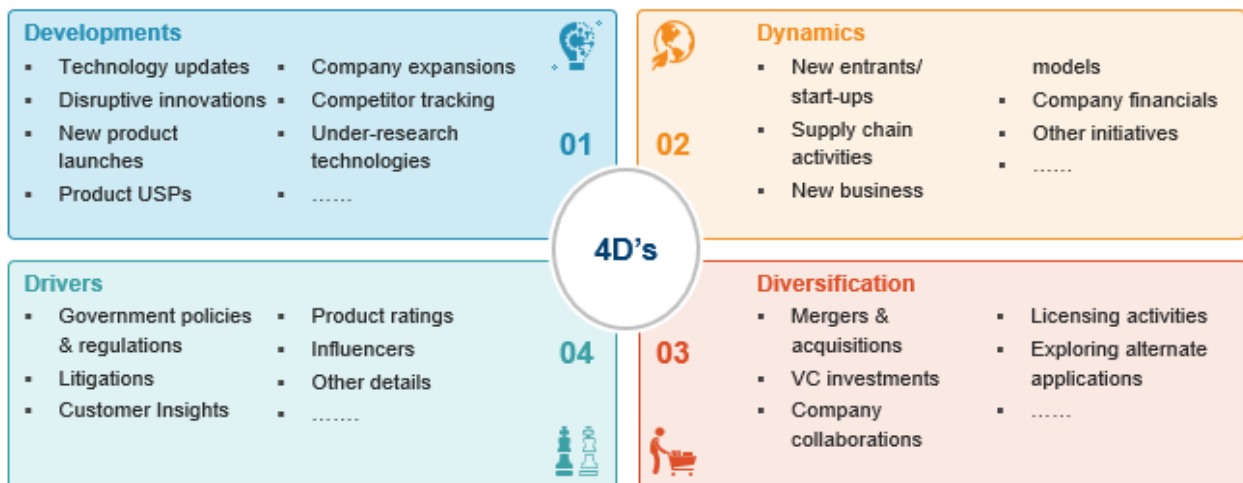
INTELLOTRACKER

Chronic Kidney/ End-Stage Renal Disease Value-Based Programs

MAY 2023



ARANCA'S QUARTERLY SECTORIAL UPDATE ACROSS FOUR DIMENSIONS....





DEVELOPMENTS

New Product/Services Launch		Interwell Health's value-based care initiative aims to decrease emergent dialysis cases for CKD and ESKD patients, primarily within Providence Health's patient population. <i>Source: Nephrology News & Issues</i>
New Product/Services Launch		Trinity Health and Strive Health will improve treatment for CKD and ESKD in Loyola Physician Partners patients through predictive analytics and machine learning. <i>Source: Health IT Analytics</i>
New Product/Services Launch		Baxter's 'Choose Freedom' campaign educates CKD patients on Peritoneal dialysis for greater awareness and understanding. <i>Source: India Times</i>
Company Expansions		Monogram Health, a specialty provider of in-home, evidence-based care and benefit management services for patients living with polychronic conditions (CKD/ESRD), is now available to Cigna Medicare Advantage customers nationwide. <i>Source: PR Newswire</i>
Company Expansions		Panoramic Health SM has expanded in Texas by partnering with Nephrology, Dialysis & Transplantation Associates, P.A. at The Kidney Institute and acquiring North Shepherd Dialysis Access Center. Managing \$70 million of risk spend in the Greater Houston with the largest nephrologist-led participant in Medicare's CKCC program, <i>Source: News Wire</i>



DYNAMICS

New Business Model		Strive Health rapidly expanded in Medicare's CKCC Model, now managing 73,000+ chronic kidney disease patients and \$2.5B in medical spend through partnerships with nephrologists and direct care arrangements. <i>Source: Globe News Wire</i>
Other Activities		Renalytix, Partners Launch \$10M Consortium to Develop Kidney Disease Drug Response Tests <i>Source: Genome Web</i>



DRIVERS

Insurance		More ESRD beneficiaries are switching from Medicare FFS to Advantage, prompting increased value-based partnerships between Medicare Advantage plans and kidney care management companies, per Avalere. <i>Source: Global News Wire</i>
Government Policies & Regulations		Hansa Biopharma's Idefix [®] has been granted access and reimbursement by the Spanish Ministry of Health for desensitizing highly sensitized adult patients before kidney transplant. This decision comes after conditional approval from the EMA in August 2020. <i>Source: PR News Wire</i>



DIVERSIFICATION

Fundings		Monogram Health, a tech startup, secures \$375M funding with support from CVS and Cigna to enhance kidney care coordination. <i>Source: Fierce Healthcare</i>
Company Collaboration		ExactCare and a national dialysis provider have partnered to enhance medication management for ESRD patients. Early data shows positive clinical outcomes, meeting CMS QIP requirements for dialysis providers. <i>Source: Globe News Wire</i>
Company Collaboration		Interwell Health expands government value-based care model, serving 62,000 Medicare CKD patients through partnerships with 1,300 nephrology providers in 26 states, improving their lives. <i>Source: Company News</i>
Company Collaboration		Somatus and UnitedHealthcare extend their value-based partnership to offer comprehensive kidney care services to new members in CT, IL, MA, NJ, and RI with chronic or end-stage kidney disease. <i>Source: PR Newswire</i>

Company Collaboration	 	<p>Evotec and Bayer have formed a 5-year partnership to develop clinical candidates for treating kidney diseases like CKD in diabetes patients, sharing responsibilities and utilizing advanced technology platforms.</p> <p>Source: Company News</p>
Company Collaboration	 	<p>The ADA and Elevance partner to improve health through enhanced What Can I Eat? (WCIE?) program. They aim to address social determinants of health in underserved communities, reducing kidney disease risk associated with poorly managed blood glucose.</p> <p>Source: Company News</p>
Company Collaboration	 	<p>Oak Street Health and Interwell Health have partnered to form OakWell, providing primary care to end-stage kidney disease patients within dialysis centers.</p> <p>Source: Fierce Healthcare News</p>
Company Collaboration	 	<p>Evergreen Nephrology and Innovaccer Inc. announced a partnership to leverage the company's Health Cloud platform to optimize care management and delivery at the value-based care organization.</p> <p>Source: Health IT Analytics</p>
Company Collaboration	 	<p>Wellsky teams up with Panoramic Health to enhance healthcare and outcomes for patients with chronic kidney disease.</p> <p>Source: Business Wire</p>
Company Collaboration	 	<p>Somatus and Duneland Nephrology join forces to provide quality kidney care to patients in northwestern Indiana, enhancing healthcare access for those with CKD and ESKD.</p> <p>Source: PR Newswire</p>
Company Collaboration	 	<p>Healthy.io and Reset Kidney Health partner to offer at-home, smartphone-powered kidney testing. Eligible patients receive Healthy.io's Minuteful Kidney™ test. Kits can be requested through Reset's platform.</p> <p>Source: Hit Consultant</p>

SOLUTION PORTFOLIO – TECHNOLOGY RESEARCH & ADVISORY

IP Strategy	Technology Intelligence	Growth & Strategy
<p>How best can we proactively manage and monetise our technical knowhow / intellectual property?</p>	<p>How best can we keep abreast of technology trends, competitor activity and headwinds / tailwinds in our domain?</p>	<p>Which technologies do we invest in? How do we ensure quick wins? Speed to market?</p>
<ul style="list-style-type: none"> IP Portfolio Analysis 	<ul style="list-style-type: none"> Competitor Benchmarking 	<ul style="list-style-type: none"> R&D Strategy Roadmaps
<ul style="list-style-type: none"> IP Monetisation 	<ul style="list-style-type: none"> Tech / IP Landscapes 	<ul style="list-style-type: none"> Technology Scouting
<ul style="list-style-type: none"> IP Valuation 	<ul style="list-style-type: none"> Technology Watch 	<ul style="list-style-type: none"> Open Innovation
<ul style="list-style-type: none"> Prior Art Searches 	<ul style="list-style-type: none"> Market Analysis / Trends 	<ul style="list-style-type: none"> Product Development



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