Reimbursable digital healthcare applications (DiGAs) in Germany: Price developments and payer perspective

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OBJECTIVES

In 2022, payers and manufacturers concluded first price negotiations for permanent DiGAs. In March 2022, the GKV-SV published a first report on its perspective on DiGAs costs and relevance in the German healthcare system. Purpose of IQVIA’s analysis was to evaluate DiGA price developments and discuss these in terms of payer positions.

METHODS

IQVIA extracted all DiGA prices from the DiGA-directory to track changes from actual manufacturer to negotiated prices. To identify payer perspectives on DiGA pricing, a qualitative content search was conducted in relevant German healthcare media from March to June 2022 using pre-specified search terms ("DiGA price" and "DiGA costs", in German). Articles about the reimbursement process itself were not considered. Within the extracted articles, relevant quotes were identified by keyword searches ("price", "costs", "reimbursement", in German).

RESULTS

By June 2022, there were 12 permanent and 19 preliminary DiGAs. The area of mental and behavioral disorders counts the most DiGAs listed, with a total of 13 DiGAs. Price negotiations were completed for 4 permanent DiGAs. Disagreements between manufacturers and GKV-SV required an arbitration board to set reimbursement prices in all 4 cases resulting in an average 54% reduction compared to previous manufacturer prices. For mental health DiGAs, relative costs seem to be 63% lower than SOC costs.

Prices of preliminary DiGAs for mental and behavioral disorders, which the manufacturer sets at market entry, range from 239€ to 620€. For metabolic and nutritional disease actual manufacturer prices range from 250€ to 500€ and for musculoskeletal diseases from 119€ to 345€. All other indications contain only one preliminary DiGA and prices range from 449€ to 718€. (Research update before poster submission: By October 2022, 13 permanent and 20 preliminary DiGAs are listed in the directory. Furthermore, price negotiations have taken place for 2 additional DiGAs, confirming the results from June 2022.)

The reimbursement price of all 4 DiGAs with completed price negotiations is significantly lower than the previous price set by the manufacturer. In all cases, a similar reimbursement price results between 204€ and 235€, regardless of the previous price level.

CONCLUSION

Even though payers recognize the innovative character of DiGAs, reimbursement price levels remain unchanged and too high in their opinion. In contrast, DiGAs seem to face significant price reductions after reimbursement negotiations with lower relative costs than SOC. Further analyses on the arbitration board’s rationale, the role of selective contracts, future price negotiations as well as further stakeholder positions are required to confirm or reject current payer criticism.

Abbreviations: BfArM: Bundesinstitut für Arzneimittel und Medizinprodukte (Federal Institute for Drugs and Medical Devices); DiGA: Digitale Gesundheitsanwendung (reimbursable healthcare application); GKV-SV: Bundesagentur der Krankenkassen (German national association of payers); PERM.: permanent listing; PRELIM.: preliminary listing; SOC: standard of care.