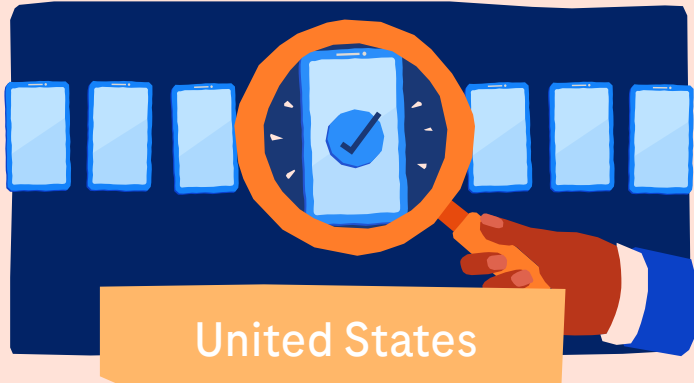


Common reimbursement pathways for digital health solutions

Reimbursement pathways for digital health solutions are emerging and will continue to evolve. A non-exhaustive list of reimbursement pathways in four leading markets is described below.



United States

Integrated delivery networks

Corporate networks of healthcare services with an integrated payer component directly assess digital health solutions with a view to reimbursement.

Private health insurance plans

Health insurance providers directly assess digital solutions which they may reimburse and integrate into their offerings.

Direct-to-consumer (DTC)

Digital health companies may elect to sell certain digital products or services directly to end-users.

Less common routes to reimbursement:

Public healthcare funding (e.g., through Medicaid and Medicare health funds) is viable for some solutions.



United Kingdom

Integrated Care Systems (ICS)

National Health Service (NHS) reimbursement decisions in England are predominantly made at a local level by 42 integrated care systems. This remains the most viable route to market for most digital solutions.

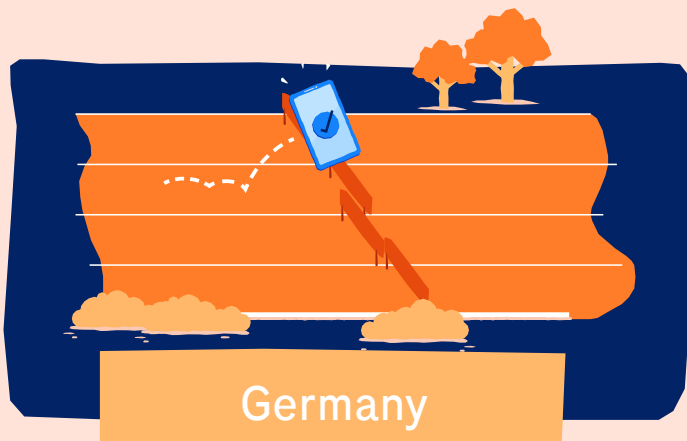
The NICE evidence standards framework (ESF) for digital health technologies provides local decision-makers with guidance on how to assess evidence when procuring a solution. NICE also publishes recommendations on

individual solutions, which typically helps to support procurement but is not directly tied to funding.

Less common routes to reimbursement:

Certain solutions for specialist services may be funded at a national level via special mandates. E.g., in Scotland, national reimbursement was granted for digital cognitive behavioural therapy (CBT) solutions.

Digital health solutions can be reimbursed through contracts with private health insurers.



Germany

DiGA

The Fast-Track process for digital health applications (DiGA) provides a route to national coverage and reimbursement for patient-facing apps that are Class I and IIa medical devices (under EU regulations).

Statutory health insurers

Contracts with statutory health insurers ('sickness funds') can provide a route to regional coverage for digital solutions.

Less common routes to reimbursement:

Digital health solutions can be reimbursed through contracts with private health insurers.



France

Mon Espace Santé

France is implementing a national register of approved apps similar to that in Germany. Apps are available to all citizens via the Mon Espace Santé platform. The Ministry of Health and Health Insurance have outlined evidence requirements which must be met for inclusion of an app on the register.

Statutory health insurers

Individual contracts with statutory health insurance providers are viable for solutions approved for reimbursement by Haute Autorité de Santé (HAS).

Less common routes to reimbursement:

Digital health solutions can be reimbursed through contracts with private health insurers.