ECR Exclusive | Key Takeaways

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Managing the Italian and Iberian markets for AGFA HealthCare, Andrea gives us his summary of Europe's biggest radiology event.

Takeaway 1
AI Market

AI is the topic, and certainly the most important market demand of the event. Artificial Intelligence was everywhere, and was a firm expectation considering ECR's Next Generation Radiology theme.

- We saw the consolidation of AI vendors – some players having not survived the start-up and investment phases, whilst others having been acquired by bigger AI vendors.
- We experienced the trend of commoditization. It is common feeling that, at some point in the near future, AI tools could become commodity features. I envisage that they will be directly embedded in the imaging modalities or in the PACS/EI/post-processing tools – as was the case in the beginning with MIP/MPR/3D solutions.
- Try before Buy: When discussing with regions and large healthcare providers, this is often the only way they will accept – i.e. avoiding investments on a site-by-site model. They are requesting to have centralization where they can add the selected AI apps, then have all their sites accessing those modules.
- Some consistent requests from the market, namely:

  - Having the possibility to test the AI algorithm with their own studies – the try-before-buy approach is a requirement. During our meeting with KLAS Research, it was confirmed that the request for a test period is seen by a lot of potential buyers as the first step of implementing AI.

  - Flexibility to integrate their own choice of AI algorithms within our Enterprise Imaging platform.

Takeaway 2
AI Implementation

There is now not only curiosity, but strong belief that AI will work effectively. Customers are starting to understand the potentials behind the AI applications which are integrated within their PACS/EI solution and existing workflows. It was demonstrated, from insightful discussions with the clinical community, that true potential is expected from:

- Efficiency (tackling challenges on staff shortages and burnout)
- Decision Support and Diagnostic Aids
- Screening processes
- Incidental findings
- Support to Residents/Students
- Automatic prefilling of reports

It was also concluded that there are a very limited number of concrete real cases and real-life experiences – therefore not demonstrating full visibility on foreseen challenges, such as potential drawbacks/issues – but equally, the lack of proven outcomes means that **potential unexpected benefits** also do not have visibility at this point.

Takeaway 3
Radiologists burnout/shortage

We hear this topic often - throughout all of our geographies. Radiologists are open with their position – there are fewer radiologists everywhere, and so they are looking at every possible technology that can be harnessed to support them and improve efficiencies in diagnosis and reporting. AGFA HealthCare's life in flow messaging anchor resonates and is perceived as an empowering message to the community.

That's life in flow.

AGFA HealthCare

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Takeaway 4
Structured Reporting/Precision reporting

At ECR, we had confirmation of the fundamental requirements for clinicians working in the Radiology field.

- The need for Business Intelligence tools to be applied to Structured Reports to extrapolate "knowledge" from the report content. Some customers seek the ability to create their own Structured Reports leveraging within their own IT Dept.

- The market is moving towards "ontology" and "semantic" reporting tools, allowing to work on the real meaning of the medical findings without looking at the language specificities. This is particularly useful for hospital networks or Teleradiology Services companies.

Takeaway 5
Digital Pathology

The market is also starting to look at Digital Pathology solutions as a key integrated component to their Enterprise Imaging Platform. We can predict significant investments within the next 3-5 years with large-scale pathology tenders emerging.

- We noted that the evangelization process in Digital Pathology departments is still at an early stage; the benefits of the Enterprise Imaging strategy are still not readily perceived, and the concrete application has been a slow start.

- The return-on-investment still depends mainly on Pathologist shortages, and the onward possibility to create Digital Pathology networks. However, replacing physical specimen archives with digital images storage is still not possible in many countries.

- The Digital Pathology market is still mainly driven by LIS vendors or scanner vendors.

Other insights

Streaming Client
For IT delegates, streaming client was a key differentiator factor and a technology leap forward that is a "condicio sine qua non" to transition to Cloud. For Radiologists, this is mainly perceived as a benefit for efficiency, accessing remote studies and running on every device platform (including the Apple Safari® browser application program).

Cloud/SaaS
Many vendors are claiming to have a full Cloud/SaaS solution, but the reality is that most of the players are still facing issues in the transition to Cloud architectures.

Workflow Orchestration
As was confirmed many times at ECR, workflow orchestration is one of the primary demands for healthcare networks/integrated care systems.

That's life in flow.

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