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How PACS is Intensifying Commercial Pressure on Radiologists and Insight into the Changing Market

Interviewee

Marcel Swennenhuis

Global Marketing Director

AGFA Healthcare

Mortsel, Belgium

“PACS’ rapid absorption worldwide, is not just down to the initial hope that it would save money on long-term film costs.With PACS came the ability to clarify and manipulate images, the advent of integrated information systems and a solution to problems such as the shortage of radiologists in some countries, the increasing demand for imaging exams and the growing aging population in Europe.With hindsight, it has altered the development of radiology as a profession, forcing radiologists to think more about customers and what they want.”

Has Globalisation Impacted Radiological Workflow?

_ Increasing globalisation means that the cost of PACS is coming down. In the next few years, hardware will become extremely affordable for clinicians who didn’t previously have access to the images without the radiologist, e.g., an orthopaedic surgeon may soon purchase PACS technology to view an exam before the radiologist has even had time to make the report! Also, the clinician is becoming more involved due to multi-disciplinary team meetings and has greater input in the diagnosis process than ever before. If there is a shortage of radiol ogists, will other less qualified clinicians fill it? This is a big risk. Radiologists must now prove that they bring added value to the imaging process to avoid losing ground.

What Factors will Increase Commercial Pressure on Radiologists in the Future?

_ Nobody could have foreseen the rise of private imaging centres in the US, 8 – 10 years ago. Now there are over 5,000 such centres, a number that increases by 10% each year. This is the direct result of PACS. It has the effect of making radiologists realise they have to compete with referring clinicians for their customers. In the EU it depends on the reimbursement structure of the individual country. For example, in Holland, hospitals are scored on performance and results are published on the internet for patients to read and make informed choices about where they have their treatment or diagnosis performed. This puts commercial pressure on radiologists to focus on patients.

How will the Global PACS Market Change in the Coming Years?

_ Ironically, prices in the EU are lower due to greater competition. The problem in Europe is that most major hospitals already have a comprehensive PACS solution. Therefore the new targets are the smaller institutions and private centres that have yet to get on the PACS bandwagon. Many smaller companies have shot up to service the needs of smaller imaging centres, and are edging the big industrial forces out of the market. This has lead to situations, for example, in Holland, where there are not many private imaging centres, and the PACS market is collapsing. However, in Germany where there are many private imaging centres, there is a very strong market.

What are Some Common Mistakes PACS Purchasers Make?

_ Many imaging centres and medical institutions in the process of developing an investment package, are not necessarily making the best choices. If you are working in an area that does not have terrifically high throughput or that necessitates the highest quality display, then you can save by choosing the lesser model, and channelling capital into better areas such as increasing the number of workstations, or improved software.

Radiology departments need to define their concrete, real needs. When choosing which equipment to buy, they real question is: can I do the same job with the less expensive model? And would capital be better invested in other areas?

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