

Healthcare Information Technology of Tomorrow Seen from the Vantage Point of the Synektik Group Today

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Three complementary pillars of medical technology

The Synektik Group's integrated approach

We are creating an ecosystem of solutions for modern diagnostics and treatment

Therapies



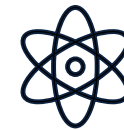
- Aa Vinci systems (exclusive distribution PL, CZ, SK, Baltic states)
- Symani – microsurgery
- > 120 systems installed
- > 32,300 procedures per annum

Medical information technology



- Proprietary solutions
- Distribution of software and IT hardware
- Support and consulting services
- IT4KAN MedTech software house

Diagnostics



- Radiopharmaceuticals (e.g. FDG, PSMA, choline)
- 3 production plants in Poland
- Largest domestic producer
- Cyclotrons and PET centers

Integrated ecosystem: diagnostics + treatment + data

Medical information technology

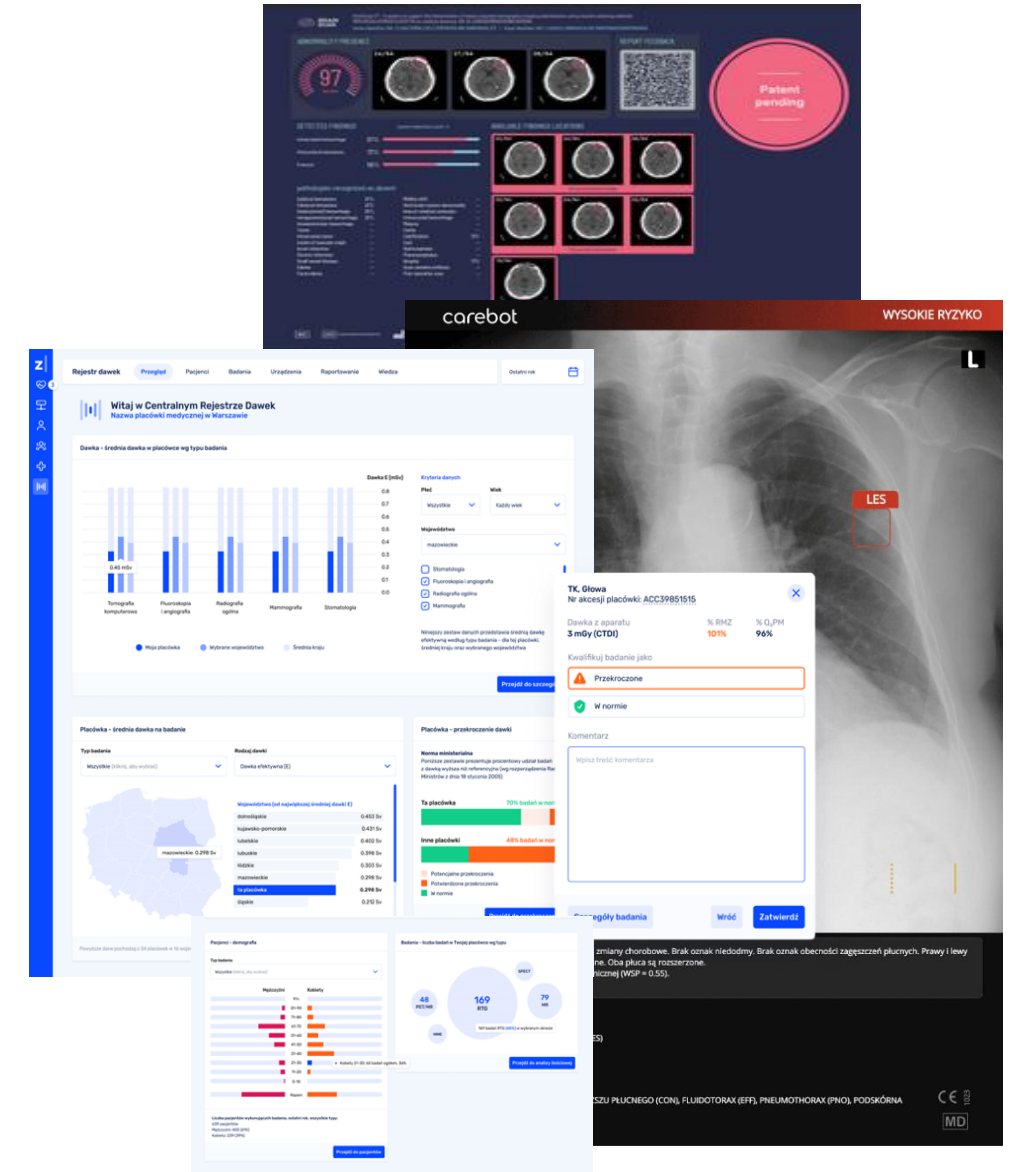
Key areas of activity

PACS / Digital archiving

- ArPACS – Picture Archiving and Communication Systems (CT, MRI, X-ray, USG), browsers MedDream Viewer, ArView, certified class IIb medical products.
- **Roughly 300 centers | > 2000 radiologists utilize our solutions**

RIS / Radiology management

- Radiology Information System – scheduling exams, patient records, reporting results, settlements with the National Health Fund
- **Full integration with PACS | Compliance with HL7CDA**



Medical information technology

Key areas of activity

Zbadani.pl – e-health platform

- Patient portal (Digital Patient File), ORR (Online Results Release) module for imaging labs, Medical Documentation Release to exchange documentation between centers
- **~20 000 tests / month | ~1 500 new accounts / month**

SynDose – dosage monitoring

- Monitoring and reporting radiation dosages. Integrating AI tools to analyze radiological images (under development)
- **~ 700 devices | integration with all PACS systems**

AI solutions

- We are a distributor of the leading AI solutions on the market, including X-ray and CT of the chest, head, bones and mammography
- **Regulatory compliance | AI-ready PACS**

zbadani.pl

zbadani.pl

9:41
Piątek, 9 Maja

Zbadani.pl
Placówka medyczna udostępnia Ci badanie do wglądu i komentarza. Sprawdź je na wdm.zbadani.pl. Ważne do 26 maja, 9:40

Ręczne dodawanie rekordu badania

1. Pacjent 2. Badanie 3. Projekcje

Wyszukaj pacjenta po nr PESEL, lub imieniu i nazwisku

Wyszukaj i wybierz

Badania

Analiza ilościowa Analiza dozymetryczna Widok listy

Typ badania Część anatomiczna Urządzenie Rodzaj dawki Płeć Wiek Przekroczenie dawki Metoda dodania

Lista badań

Typ	Cz. anatomiczna i nazwa badania	Data badania	Dawka E (mSv)	Urządzenie	Pacjent	Kwalifikacja dawki	Ostatnio przez
RTG	Nieokreślona RTG STAWU BIODROWEGO A-P	09.07.2023 17:02	1.155	SYNDOSE2 RT01 SIEMENS Fluorospot Compact FD	 (F)	Przekroczona	@SynDose 28.11.2023, 11:57
RTG	Miednica RTG MIEDNICY A-P	09.07.2023 16:47	0.707	SYNDOSE2 RT01 SIEMENS Fluorospot Compact FD	 (F)	W normie	@SynDose 28.11.2023, 11:45
RTG	Klatka piersiowa RTG KŁATKI PIERSIOWEJ P-A	09.07.2023					
RTG	Nieokreślona RTG RZEPKI A-P I OSIOWE	09.07.2023					

Report jednostkowy Report jednostkowy Report zbiorczy

Informacja o badaniu

Analiza badania

Nazwa badania

Data i godzina badania

Numer akcesji (PACS/Zbadańi iD)

Część anatomiczna

Nazwa aparatu

Operator

Wiek i nazwisko (płeć)

PESEL

Wiek (podczas badania)

Wzrost i waga (podczas badania) BMI

Ciężar

Radiografia

RTG miednicy a-p

10.07.2023, 10:54

20230710160704517003000788F

Miednica

RTG

Edycja

ZYGMUNT PAWEŁEK (M)

.....

40

-cm -kg (-) Edycja

Nie ustalono

Kwalifikacja dawki w badaniu

Odczytanie

W normie 28.11.2023, 11:53 @SynDose

Przebieg

W normie 09.10.2023, 10:20 @SynDose

W normie 27.09.2023, 12:50 @SynDose

Projekcje w badaniu

Nazwa procedury (szczegółowo)	DAF (mSv)	E (mSv)	W (mSv)	W (mSv)	W (mSv)
Dawka na badanie (Total)	9.82	1.129	-	-	-
Radiografia, miednica, AP	9.82	1.129	27	11	W normie

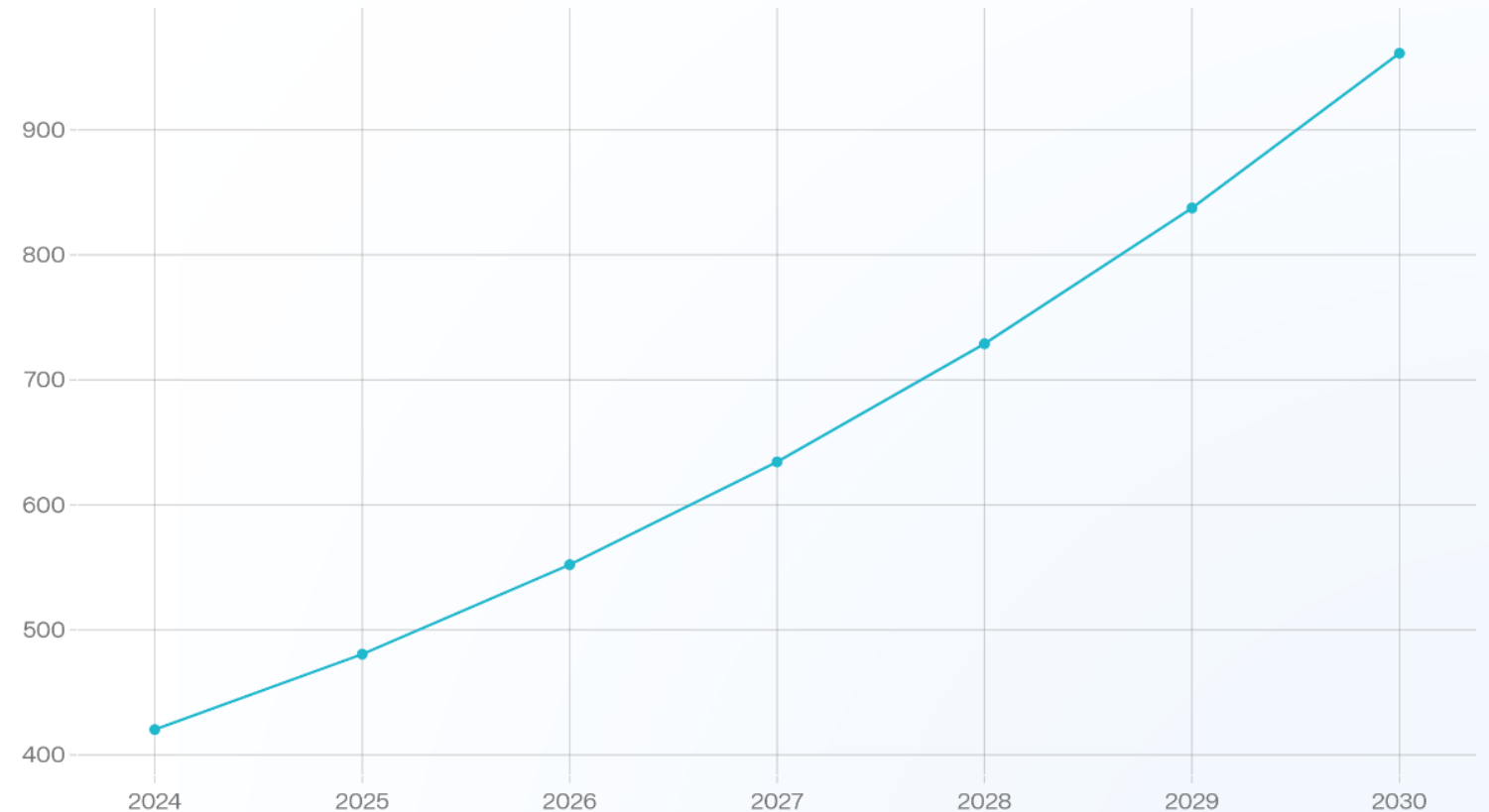
Healthcare information technology today

Present state

Market and adoption in Europe

- Global Healthcare IT Market:
420 bn USD (2024) → 961 bn USD (2030), CAGR ~14.7%
- Europe: **79.7–267.2 bn USD, CAGR ~22.3%**
- PACS/RIS market globally:
4.1–6.6 bn USD, CAGR ~7.5%
- 90% of the hospitals in Western Europe are responsible for **64% of new PACS implementations – in the cloud**
- Poland: e-Health result **6th place in the EU**
- **20 m+** active (IKP) Internet Patient Accounts (53% of all citizens)
- **2.47 bn e-prescriptions** issued to date

Global healthcare IT market (2024-2030)



Source: MarketsandMarkets

Healthcare information technology today

Present state

Key gaps and needs

- Only **26% of the EU member states** make medical images available online
- Only **13.2% of the hospitals in Poland** employ AI
- 90% of all healthcare organizations encountered a cyberattack attempt in the last 12 months
- CEE hospitals: smaller IT budgets than in the west (to date)
- Legacy systems: fragmented, silo-based
- Many systems need to be replaced or upgraded



Trends shaping the healthcare IT of tomorrow

AI in imaging diagnostics

- The AI market in diagnostics: **1.7 bn USD → 4.7 bn USD** (2029), **CAGR 22.5%**. Automatic analysis of CT, MRI, X-ray

The cloud in healthcare

- Europe: **10.6 bn USD → 44 bn USD (2033)**, **CAGR 17.2%**. New PACS implementations – 64% of them are already in the cloud

Interoperability (FHIR/DICOM)

- EHDS mandates data exchange based on FHIR. Only **26% of the EU member states** make images available online
- **2029 regulatory requirement**

Cybersecurity

- More than **1 000 incidents** in Poland's healthcare sector (2025). NIS2 Directive, Cyber Resilience Act, MDR
- Cost of a breach: **4.7 m USD** (x2 in healthcare)

Telemedicine and patient monitoring

- Europe: **22 bn USD → 42 bn USD (2030)**, **CAGR 11.2%**. Aging population as a structural driver

Big data and predictive analytics

- Market: **13.5 bn USD → 50.4 bn USD (2030)**, **CAGR 24.7%**. EHDS to unlock population data as of 2029

New regulations

An opportunity or an obstacle?

Key regulations

- **EHDS** (European Health Data Space)
 - including System Interoperability
- **MDR** (Medical Device Regulation)
 - Software as a Medical Device (SaMD)
- **EU AI Act** – High Risk AI in Diagnostics
- **NIS2** (Network and Security Directive 2)
 - cybersecurity
- **EUDAMED** – mandatory registration starting in May 2026
- **CRA** (Cyber Resilience Act) – hardware and software security

Selected implications for Synektik

- All players on the market have to customize their solutions and services
- Opportunity to build integration services and tap into data from other systems
- Prospective streams of new proprietary and partner services
- Build a greater competitive advantage
- Further market consolidation among firms offering healthcare IT solutions
- Higher financial expenditures for IT to be incurred by medical centers

IT market in the CEE and the NRRP's impact

Faster pace of growth in our region, additional boost provided by EU funds

Healthcare IT Market in CEE

- Healthcare IT in Europe:
79.7–267.2 bn USD (2024-30), CAGR ~22.3%
- **CEE** is growing faster than the West
- Lower level of digitization = **greater upside**
- Poland: IT = **8% of GDP – largest market in CEE**
- **CEE: 1.75 m IT engineers**, lower development costs

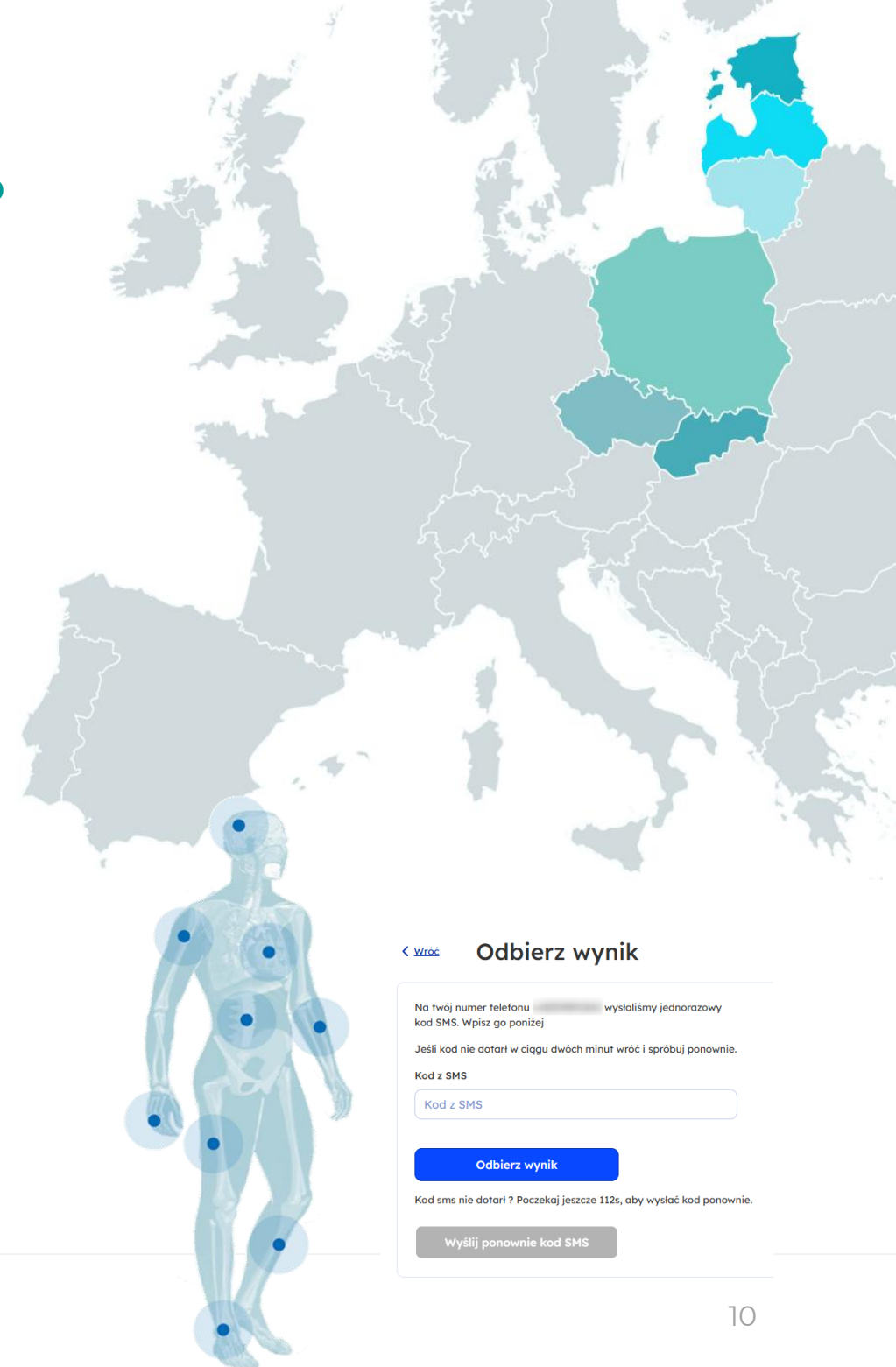
National Recovery and Resilience Program (NRRP) - Financing Digitization

- **~17–18 bn PLN (~4.1 bn EUR)** to modernize healthcare
- Including: **4.4 bn PLN for digitization** (EMR, AI, cyber)
- **CeZ: 1.25 bn PLN from NRRP** for 9 digital projects
- **ERDF (RPO, FEnIKS): 1.03 bn EUR** for healthcare (2021–2027)
- Poland – **largest beneficiary** of EU funds for healthcare

Summary

Prospects for the development of the IT segment in the Synektik Group

- The Synektik Group is the sole **integrated ecosystem** in the CEE region: therapy + IT + advanced diagnostics.
- Further **development of proprietary IT solutions** coupled with implementing tested technologies from around the world.
- **Cross-sell** to our clients in each area of the Group's activity
- Healthcare IT Segment – **strategic growth pillar**
- The healthcare IT market is expanding in Europe; **regulations create barriers to entry that are conducive to major players.**
- Customizing solutions to incorporate upcoming regulatory changes – **a short-term investment to produce long-term earnings.**





Synektik

THANK YOU FOR YOUR ATTENTION!

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