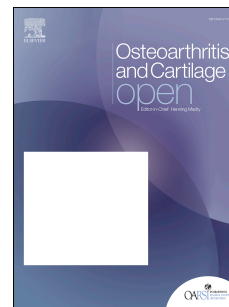


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## The Use of Technology in the Subcategorisation of Osteoarthritis: a Delphi Study Approach

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**Running Headline**

Subcategorising Osteoarthritis

**ABSTRACT****Objective**

This UK-wide OATech+ Network consensus study utilised a Delphi approach to discern levels of awareness across an expert panel regarding the role of existing and novel technologies in osteoarthritis research. To direct future cross-disciplinary research it aimed to identify which could be adopted to subcategorise patients with osteoarthritis (OA). **Design**

An online questionnaire was formulated based on technologies which might aid OA research and subcategorisation. During a two-day face-to-face meeting concordance of expert opinion was established with surveys (23 questions) before, during and at the end of the meeting (Rounds 1, 2 and 3, respectively). Experts spoke on current evidence for imaging, genomics, epigenomics, proteomics, metabolomics, biomarkers, activity monitoring, clinical engineering and machine learning relating to subcategorisation. For each round of voting,  $\geq 80\%$  votes led to consensus and  $\leq 20\%$  to exclusion of a statement.

**Results**

Panel members were unanimous that a combination of novel technological advances have potential to improve OA diagnostics and treatment through subcategorisation, agreeing in Rounds 1 and 2 that epigenetics, genetics, MRI, proteomics, wet biomarkers and machine learning could aid subcategorisation. Expert presentations changed participants' opinions on the value of metabolomics, activity monitoring and clinical engineering, all reaching consensus in Round 2. X-rays lost consensus between Rounds 1 and 2; clinical X-rays reached consensus in Round 3.

**Conclusion**

Consensus identified that 9 of the 11 technologies should be targeted towards OA subcategorisation to address existing OA research technology and knowledge gaps. These novel, rapidly evolving technologies are recommended as a focus for emergent, cross-disciplinary osteoarthritis research programmes.

**Keywords (4-6 words).**

Stratification; Osteoarthritis; Technology; Phenotype; Omics; Biomarkers.

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2  
3 It is predicted that there will be a 4- to 6-fold increase in the number of total joint replacements  
4 for osteoarthritis (OA) in the coming decades<sup>[1]</sup>. Despite the increase in prevalence and the large  
5 body of literature existing on the subject, definitions of OA subcategories, whether in clinical or  
6 research environments, are often disparate. The OATech Network+, a multidisciplinary  
7 consortium, had identified this as a potential limitation to furthering OA research. Whilst X-rays  
8 are one of the most commonly used technologies for studying OA for decades, there have been  
9 many recent technological developments applied to the field, for example, in genomics and other  
10 'omics', different forms of imaging, and computational analysis of big data.

11  
12 The OATech Network+ organised a consensus meeting combining experts in a broad range of  
13 existing and novel technologies (with basic scientists and clinicians) to appraise the potential of  
14 existing and new technologies and improve OA subcategorisation. A Delphi approach was  
15 adopted, aiming to recommend improved targeting of technology for OA subcategorisation so  
16 that existing and emerging treatments could be applied more effectively to selected patients or  
17 subgroups.

18  
19 The meeting commenced with experts in the fields of engineering, rheumatology, orthopaedic  
20 surgery, radiology, physiotherapy, biology and OA pain perception sharing their experience of  
21 OA research. Experts in more recently developed technologies lectured on their OA research  
22 application, summarised below.

### 23 24 **Genetics and genomics**

25  
26 The field of complex trait genetics has witnessed a revolution in technological advances over the  
27 last decade, enabling the genome-wide interrogation of sequence variation, leading to the

28 discovery of thousands of genetic risk loci. Recent methodological advances have also enabled  
29 deep molecular characterisation of disease-relevant tissues collected from human patients or  
30 studied in cellular and organismal models of disease. Together, these can help enhance our  
31 understanding of the mechanisms underlying disease development and progression<sup>[2]</sup>. Large-  
32 scale genetics can help improve our understanding of the genetic aetiology of OA and related  
33 sub-groups by interrogating big data in genetics, genomics and medically-relevant phenotypes  
34 from rich epidemiological resources, patient collections and disease registries. Functional  
35 genomic approaches for integrated molecular phenotyping of relevant cell types can help  
36 translate insights from genomics into mechanisms of disease in order to overcome the critical  
37 barrier of there being currently no disease-modifying treatment for OA. The relevant diseased OA  
38 tissues are readily available from joint replacement surgery, enabling the study of molecular  
39 processes in the appropriate tissues, both to fill a gap in our fundamental understanding of  
40 biology and to identify novel therapeutic avenues.

41

#### 42 **Epigenetics and Functional Analysis**

43

44 Epigenetics is a mechanism used by the cell, tissue and organ to regulate gene expression in a  
45 dynamic manner by reversible chemical changes to the genome. There are three epigenetic  
46 markers: DNA methylation, histone modification and the activity of regulatory RNAs<sup>[3]</sup>. Epigenetic  
47 changes are context specific and show temporal and spatial effects. They act during  
48 skeletogenesis and joint formation, and have a role in OA<sup>[3-5]</sup>. As for genomic studies, the  
49 diseased joint tissues such as articular cartilage, synovium or bone, are used in relatively large  
50 quantities to extract DNA, chromatin and RNA for epigenetic analysis. Such studies have led to  
51 subcategorisation of OA by, for example, identifying individuals who appear to have an  
52 inflammatory component to their disease<sup>[4]</sup>.

53

#### 54 **Proteomics and Metabolomics**

56 Proteomics and metabolomics can be used to identify molecules as possible predictors of early  
57 disease, disease progression and response to treatment. Synovial fluid contains systemic  
58 proteins and metabolite markers of disease and holds significant potential for the discovery of  
59 proteins and metabolites to aid subcategorisation of the disease.

60

61 Whilst transcriptomics can indicate the proteome, the relationship between mRNA and proteins  
62 is complex and thus identifying proteins in a sample and how they vary is paramount.  
63 Quantitative proteomic differences between sample groups can be identified using either  
64 absolute or relative quantification, with or without labelling (reviewed<sup>[6]</sup>). Absolute quantification  
65 has been used to measure up to 20 targeted proteins in a single experiment<sup>[7]</sup>. Label-free relative  
66 quantification using synovial fluid has been used and predictors of treatment outcome with  
67 autologous chondrocyte implantation (ACI) have been investigated for a number of biomarkers<sup>[8]</sup>.  
68 Nuclear magnetic resonance (NMR) and MS have been used in assessing metabolomics, being  
69 non-destructive, quantitative, reproducible and cost effective. Both techniques have identified  
70 up to 32 differentially expressed metabolites in synovial fluid from OA and rheumatoid arthritis<sup>[9]</sup>.

71

72 Degradomics is another proteomic method that may be useful in OA subcategorisation, assessing  
73 cleavage products at different stages in OA<sup>[8]</sup>. A further development, Matrix Assisted Laser  
74 Desorption Ionization Mass Spectrometry Imaging (MALDI-IMS), has been used to identify  
75 proteins and neopeptides altered in cartilage ageing and OA<sup>[8]</sup>.

76

### 77 **Molecular signatures and biomarkers**

78

79 All the above techniques (genomics, epigenomics, proteomics) can assist in the search for OA  
80 biomarkers, in terms of the “Burden of disease, Investigative, Prognostic, Efficacy of intervention  
81 and Diagnostic (BIPED)” classification scheme<sup>[10]</sup>. To date, many candidate proteins,



82 carbohydrates and lipids<sup>[11]</sup> have been investigated<sup>[12]</sup>. Several are associated with disease  
83 progression in OA cohorts, but are not able to stratify individuals<sup>[13]</sup>. A 'molecular signature'  
84 representing multiple protein or non-protein markers may be more realistic for OA than finding a  
85 single biomarker, perhaps better indicating relevant shared mechanisms within the disease.

86

87 Although singleplex antibody-based assays remain the mainstay for investigation of candidate  
88 protein biomarkers, multiplexing with higher sensitivity and specificity for complex biological  
89 fluids is now possible by proprietary adaptive immunoassay approaches, such as  
90 electrochemiluminescence or proximity extension assays (combining antibody and PCR  
91 technology)<sup>[14]</sup>. Whether using immunoassay or mass cytometry (e.g. CyTOF), antibodies limit the  
92 absolute number and combinations possible, whereas non-antibody approaches circumvent  
93 these issues. Modified aptameric assays (aptamers being short sequences of nucleotides which  
94 are selected for their specificity to bind proteins in much the same way as an antibody) can be  
95 multiplexed to quantify thousands of proteins simultaneously in a single sample. These  
96 approaches have the ability to identify molecular endotypes (molecular subgroups in disease) or  
97 to predict drug toxicity and transform the way we are able to dissect molecular pathways or  
98 identify molecular signatures as biomarkers in biological fluids.

99

## 100 **Clinical Engineering**

101

102 The International Classification of Functioning, Disability and Health (ICF) provides a framework  
103 for understanding disability which links the body functions and structures to activity and  
104 participation. Clinical movement analysis, in particular 3D gait analysis, allows clinicians to  
105 measure the impact of OA on walking. This is important as patients often perceive their walking  
106 pattern as a cause as well as a consequence of the disease. Patients with unilateral disease often  
107 develop bilateral symptoms<sup>[15]</sup>.

108

109 Previous work<sup>[16]</sup> has described gait in patients with single joint disease, who do not have a  
110 typically antalgic gait pattern, but have knee loading which is high throughout the stance phase,  
111 giving them a high moment impulse, combined with muscular co-contraction. This co-  
112 contraction, measured using electromyography (EMG) further increases contact forces in the  
113 joint. 3D gait analysis can detect bilateral overloading in both hip and knee joints in patients with  
114 unilateral, single joint disease. The adopted tentative gait pattern seems to predispose other  
115 joints to OA .

116  
117 Whilst knee pain and loading measures improve after knee arthroplasty, some patients improve  
118 more than others and abnormal loading patterns often persist<sup>[16]</sup>. 3D gait analysis is useful in  
119 understanding the control and loading of the joints during movement and interpreting how these  
120 change in OA gait is important in providing appropriate therapies, such as bracing or biofeedback.

121  
122 In knee OA populations biomechanical measures at baseline have also been used to predict  
123 radiographic disease progression<sup>[17]</sup>, future total knee arthroplasty (TKA)<sup>[18]</sup> and stratify response  
124 to interventions such as and lateral wedge insoles and TKA<sup>[16]</sup>.

125

### 126 **Activity monitoring**

127

128 Recent OARSI guidelines have advocated the use of activity monitoring devices to collect  
129 objective measures of physical activity<sup>[19]</sup>. It is important for individuals with OA to remain  
130 physically active. Evidence indicates that it can reduce OA related pain, in addition to increasing  
131 muscle strength, joint range of motion and cardiovascular fitness<sup>[20]</sup>. Physical activity levels  
132 measured in OA populations over the longer term (3-12 months post-surgery) show no  
133 substantial increases in activity after 12 months<sup>[21]</sup>. Therefore more behavioural interventions are  
134 required to promote physical activity in the recovery period; a conclusion that could be missed  
135 when using more subjective self-reported measures.

137 Activity monitoring technology is rapidly advancing but for subgrouping of OA requires large  
138 amounts of data. Smart phones and wearable technology now offer the potential to collect this  
139 data outside of the laboratory and unobtrusively.

140

#### 141 **Machine Learning and 'Big Data'**

142

143 Much of the technology described with potential to improve OA stratification creates very large  
144 data sets which require computational analysis; as the quantity of data increases, meaningful  
145 analysis becomes more challenging. The use of complex artificial neural network architectures  
146 or machine learning (ML) have been shown to be capable of representing and learning  
147 predictable relationships in many diverse types of data. These computational tools hold promise  
148 for transforming the future of 'omics' and other technologies which acquire huge data sets or  
149 Big Data<sup>[22]</sup>.

150

151 Imaging modalities such as MRI are used as clinical diagnostic tools and contain vast amounts of  
152 information which lend themselves well to analysis via ML. In the following example, ML is  
153 applied to image analysis of OA in the spine, thus demonstrating the potential value of this  
154 technology in identifying subgroups of OA. ML has been used to develop an automated method  
155 for grading degeneration in the spine and intervertebral disc on MRIs<sup>[23, 24]</sup>, as used in the  
156 Pfirrmann Score<sup>[25]</sup> for degenerative disc disease or OA of the spine (developed as 'SpineNet').  
157 The system can robustly extract measurements for this, in addition to having the potential to  
158 identify other phenotypes such as spinal stenosis or 'Modic' changes in the vertebral endplates.  
159 This approach requires well defined cohorts of patients with appropriate levels of consent for  
160 this type of data storage and analysis, both for developing the program and then subsequently  
161 independent cohort(s) for validation. SpineNet also has the capability of producing so-called  
162 'Hotspots' or saliency images that can be used to visualize the parts of the MRI that are the likely

163 source of the output<sup>[23]</sup>, so possibly defining completely new phenotypes from this unbiased  
164 approach.

165

166 A prerequisite for imaging biomarker discovery is the extraction of robust and discriminative  
167 radiological measurements from joint MRIs; however, the lack of imaging biomarker  
168 standardisation within the research community, the inherent intra- and inter-reader variability  
169 and time and cost has hampered research to date. Clearly ML is providing a powerful tool to aid  
170 in the analysis of 'big data' and medical images with diverse applications too numerous to  
171 discuss here. Future ML, computational analysis and the development of automated programs,  
172 can offer robust, repeatable and rapid analysis of large datasets (MRI images or any other  
173 potential 'biomarker', provide important tools for subcategorization and identification of OA  
174 biomarkers . As novel markers of OA emerge across the biological, biomechanical, clinical and  
175 imaging interfaces, their combination will provide increasingly powerful datasets and  
176 opportunities for ML applications across OA diagnostics and classification domains.

177

178 In summary, the technologies mentioned above have developed rapidly in the last decade. For  
179 example, a literature search for 'genomics' or 'epigenomics' (using Medline and Embase) over  
180 the last 30 years highlights the increased awareness and use of such technology. From 1990-  
181 1999 genomics or epigenomics shows a total of 10 publications, 2000-2009 shows 7,322 and  
182 2010-2019 shows 23,426. With the continuous evolution of these technologies, it seemed  
183 appropriate that the OATech Network+ should address the topic of the potential of technologies  
184 for subcategorising OA and it was felt that a Delphi meeting would be an appropriate approach.

185

## 186 **METHODS**

187

188 This Delphi study consisted of a two-day focus group meeting (see programme in Supplementary  
189 Table 1), together with online surveys using 'Google Forms', to assess the level of agreement on

190 a number of statements relating to OA and the use of different technologies (see Supplementary  
191 Table 2). The group consisted of a number of different specialists (listed in Table 2), all with  
192 expertise and significant interest in OA (Supplementary Table 3). A questionnaire was  
193 formulated based on the most widely used technologies and research tools which may aid  
194 subcategorisation of OA. The technologies were chosen by the organisers from their knowledge  
195 of the field and review of the literature, including a search performed for this study. Selected  
196 examples of OA categorisations were taken from the recent literature through primary searches  
197 (using Medline, EMBASE and PubMed with 'definition of osteoarthritis' as a search term) and  
198 articles known to the authors. Questions requiring free-text opinions of panel members were  
199 included in the questionnaire, for example, 'were any questions missing' and 'what was their  
200 personal definition of OA?'. Answers to the latter were used to start discussions at the meeting  
201 and to assess the similarity of expert definition and understanding of OA. Expert consensus was  
202 reached for each statement when  $\geq 80\%$  participants agreed with the statement and rejected if  
203  $\leq 20\%$  of participants agreed, as commonly used in previous Delphi studies<sup>[26]</sup>.

204  
205 The questionnaire was tested on 3 world leading experts in the field of OA (Professors Richard  
206 Loeser, Mary Goldring and Virginia Kraus) and modified slightly on their advice, before being  
207 sent to the Delphi panel electronically. Panel members were asked if they agreed/disagreed  
208 with each of the statements. Round 1 was completed before the two day meeting. Talks were  
209 given at the start of the meeting by experts in the technologies presented in the Introduction. All  
210 statements in Round 1 were retained for Round 2, viewed 'live' on the Delphi on Google Form;  
211 any questions/statements which did not reach consensus in Round 2 were discussed in fine  
212 detail with participants suggesting potential improvements to statements. Once unanimous  
213 agreement on the wording was achieved, the wording was altered in the survey for voting on in  
214 Round 3 at the end of day 2. These changes to wording are shown in Table 1.

215 Please insert Table 1 here

216

218 The aims of the Delphi study were to determine, using a panel of experts, 1. whether novel and  
219 existing technologies could aid in the subcategorisation of patients with osteoarthritis (OA) and  
220 2. whether there is good knowledge and awareness of these technologies. This could then help  
221 define what technology gaps exist to allow recommendations on the focus of future  
222 collaborative and cross disciplinary research.

223

### 224 **Participant identification and inclusion**

225

226 Experts were selected from a wide range of disciplines relevant to the field of OA. All 130  
227 members of the OATech Network+ were invited to take part. The Delphi questionnaire was  
228 emailed to 36 potential Delphi panel experts, who were all active in the OA field and expressed  
229 an interest in attending the meeting. The minimum requirement for all invited experts was to  
230 complete all three rounds of the Delphi and attend the meeting.

231

### 232 **RESULTS**

233

234 Thirty three experts responded and completed the Round 1 questionnaires and attended the  
235 meeting, so becoming the Delphi panel (Supplementary Table 3). This consisted of basic science  
236 researchers, orthopaedic surgeons, physiotherapists, rheumatologists, engineers, radiologists,  
237 veterinary researcher and a clinical efficacy researcher from the UK (n=31), America (n=1) and  
238 the Netherlands (n=1). However, several members were multi-faceted, e.g. being clinically  
239 active and performing basic research and running clinical trials. The questionnaire showed 37%  
240 of the panel members were actively treating patients whilst 63% were not, but might have  
241 patient contact. Twenty seven percent of panel members had been working in the field of OA  
242 for 0-5 years, with 24% being involved for >20 years (Supplementary Figure 1). Although the  
243 Delphi panel was made up of a diverse group of experts, none were experts in Delphi

244 methodology. However, several panel members had significant, relevant experience of the  
245 process to mitigate this limitation.

246  
247 The wording in the statements and the results of the Delphi questionnaire over 3 rounds are  
248 shown in Table 1 and summaries of the definitions of OA provided by participants from different  
249 disciplines in Table 2. Not all panellists answered the question on defining OA as all questions  
250 were optional for panel members, so results are shown from those available, with only small  
251 variations between and within professions.

252  
253 None of the six categorisations of OA taken from recent literature reached consensus in any  
254 round (Table 1). Furthermore, 4 of the 6 literature-derived definitions demonstrated a decrease  
255 in agreement between Rounds 2 and 3 (following the face-to-face meeting).

256 Insert Table 2 here.

257 In contrast, there was unanimous agreement in Rounds 1 & 2 that the latest technological  
258 advances could be used to improve OA subcategorisation (Table 1 & Figure 1). Of the  
259 technologies identified, only the statement 'X-rays alone can be used to categorise OA  
260 phenotype' failed to reach consensus in rounds 1 and 2, whilst there was no consensus in Round  
261 2 for either X-rays or ultrasound as technologies which would to improve clinical OA  
262 subcategorisation (Table 1).

263 Insert Figure 1 here.

264 The technologies which gained greatest consensus in Round 2 for being of use in improving  
265 subcategorisation of OA were: ML (100%), genetic analysis and MRI (both 97%), proteomics and  
266 wet biomarker analysis (both 93.8%), activity monitoring (90.9%), metabolomics (both 90.6%),  
267 epigenomics and clinical engineering (both 88%). Eighty three percent of participants thought X-  
268 rays could aid subcategorisation of OA in Round 1, but this reduced to 49% in Round 2, whilst for  
269 ultrasound this changed from 59% in Round 1 to 67% in Round 2. Ultrasound was described as  
270 useful for identifying inflammation in the knee and could therefore be valuable in

271 subcategorising OA, although some members did not feel that there was sufficient evidence  
272 presented to make an informed decision as this technology was not presented at the meeting.

273

274 There was much discussion on the usefulness of X-rays and the commonly used Kellgren-  
275 Lawrence (KL) score for staging disease. Discussions highlighted that radiography is considered  
276 outdated and flawed, but that X-rays are still the gold standard (alongside clinical criteria) for  
277 diagnosis and assessing OA in the clinic, e.g. for suitability for arthroplasty.

278

## 279 **DISCUSSION**

280

281 Whilst OA has long been recognised as a heterogeneous multi-faceted disorder, progress into  
282 defining subgroups or categories has been poor; this is a likely reason why several clinical trials  
283 of novel pharmaceuticals or Disease Modifying Osteoarthritis Drugs (DMOADs) have failed<sup>[27-29]</sup>.  
284 In other areas of medicine such as asthma, subcategorisation has been achieved according to  
285 the pathological mechanisms (i.e. molecular endotyping) and clinical phenotyping<sup>[30]</sup>. It is to be  
286 hoped that this can be achieved for OA, resulting in improved diagnosis, understanding of  
287 disease mechanisms, identification of novel therapeutic targets, the development of new  
288 therapies and, subsequently better stratification and improved treatment of patients. Indeed,  
289 this was a conclusion of the inaugural meeting of an EPSRC-funded UK initiative for the OATech  
290 Network+, with the subsequent decision to utilise a Delphi-style process to address this topic.

291

292 As technology becomes more sophisticated and specialised there is a danger of working  
293 increasingly in silos. This process, including expert participants (>20% having >20 years' OA  
294 research experience), from several disciplines, facilitated an appraisal across key areas where  
295 technology has made great advances. The benefits associated with this were indicated in  
296 participant feedback, for example, the change in consensus on technologies such as clinical  
297 engineering. The process highlighted a consensus belief that adopting key existing and emerging



298 technologies (ML, genetic analysis, MRI, proteomics, wet biomarker analysis, activity monitoring,  
299 metabolomics, epigenomics and clinical engineering), would increase successful delivery of  
300 improved OA subcategorisation and discussions raised many suggestions as detailed below. In  
301 contrast, existing literature provided little agreement on the approach to OA categorisations and  
302 indeed, other studies that have highlighted the urgent need for updated definitions and  
303 categories<sup>[31,32]</sup>.

304 X-rays, discussed at length, are well known to have limitations, especially with regard to the KL  
305 scoring system for radiographic diagnosis of OA<sup>[33,34]</sup>. The inclusion of clinical and non-clinical  
306 participants was particularly beneficial with orthopaedic surgeons highlighting that X-rays  
307 remain a valued clinical technology, being relatively simple, cheap, readily available and  
308 routinely and useful for diagnosis and treatment decisions. The KL radiographic classification  
309 scheme for OA, first described in 1957<sup>[33]</sup>, remains the most widely used clinical tool for the  
310 radiographic diagnosis of OA<sup>[34]</sup>, despite its known limitations. Hence X-rays should be retained in  
311 OA studies and based on previous improvements<sup>[35]</sup>, the optimistic aim is to enhance their use  
312 through further application of ML and AI.

313  
314 Epigenetic changes can modulate the impact of risk-conferring alleles of DNA polymorphisms  
315 that are associated with OA. For example, if a polymorphism is in a gene-regulatory element and  
316 the risk allele reduces gene expression, its effect can be attenuated or aggravated by DNA  
317 methylation of that element in an allele-specific manner<sup>[4]</sup>. As such, subgrouping OA patients by  
318 their genetic and epigenetic profile might reduce the heterogeneity seen across patients and  
319 enhance the interpretability of functional studies of genetic risk.

320  
321 Large datasets generated from activity tracking through the increased adoption of smartphones  
322 and wearables, are likely to provide further opportunities to aid the stratification of OA  
323 populations. Activity monitoring research in OA populations has, in the past, been limited to  
324 measurements over short durations (i.e. up to 7-days), hence providing limited insight. Fitness

325 trackers and smart phones have revolutionised the opportunities to collect continuous activity  
326 data more reliably and over longer time periods. Objective measures of physical activity can be  
327 used for monitoring recovery e.g. following joint arthroplasty, to measure short term recovery in  
328 terms of daily step count change over the first four weeks post-surgery<sup>[36]</sup>. Extending this  
329 approach over a large sample population would allow an expected trajectory of recovery to be  
330 developed such that patients deviating from it could, for example, be flagged for follow-up  
331 consultation. Deeper analysis and modelling of the inertial sensor data collected by wearables  
332 will be important for categorising OA populations. For example, multi-dimensional analyses of  
333 activity data have been found to be more accurately associated with functional test outcomes  
334 than step-count and sedentary time measures alone<sup>[37]</sup>. Similarly, studies have investigated  
335 longer term monitoring with follow-up measures at 3-12 months post-surgery<sup>[21]</sup>. Interestingly,  
336 there was no substantial increases in activity after 12-months, concluding that more behavioural  
337 interventions are required to promote physical activity in the recovery period.

338  
339 ML was the only technology reaching 100% consensus in its ability to improve OA  
340 subcategorisation in Round 2 of the Delphi, highlighting recognition of its potential use . During  
341 discussions, the importance of integrating data, especially 'big' data, across disciplines and the  
342 application of ML approaches was highlighted as being of great importance. In big data science,  
343 ML is based on computer algorithms that can learn to identify complex patterns based on real  
344 data<sup>[38, 39]</sup>. The goal of ML is to enable an algorithm to learn from past and/or present data and  
345 then to make predictions or decisions for unknown future events<sup>[40]</sup>.

346  
347 ML/AI is of paramount importance to all technologies generating 'big data', such as genomics,  
348 all omics and imaging modalities now used in biomarker and molecular signature discovery in  
349 OA. The use of ML/AI in integrating these advanced analytical techniques, , provides the  
350 opportunity to build and test complex models incorporating important non-biomarker  
351 covariates. Multi-omics data has enabled biomarkers generations for the stratification of

352 patients into subgroups e.g. in oncology and other chronic diseases such as asthma<sup>[41,42]</sup>. This  
353 allows subcategorisation into groups based on genetic variability and other biomarkers so that  
354 medications may be tailored to individuals<sup>[43, 44]</sup>. Big data systems using multi-omics (genomics,  
355 proteomics, metabolomics and epigenomics), enables, understanding of interactions and  
356 functions of the genome, often identifying unexpected functions or possibly illustrating the  
357 interplay between the genome, the cellular environment and the progression of disease.

358  
359 In summary, a Delphi-type exercise was undertaken as a route to obtaining expert consensus  
360 from a range of disciplines, regarding the role of novel experimental technology in OA research.  
361 It provided a valid route to recommendations for the focus and direction that should be adopted  
362 by the cross-disciplinary OA research community. Rather than employing individual  
363 technologies, it is likely that combining several identified technologies (eg proteomics, imaging  
364 and clinical engineering, together with machine learning), across sites, focussing on one or more  
365 OA subgroups will reap real benefits and provide important advances in the field of  
366 osteoarthritis research.

367

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369

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383

#### 384 **Author contributions**

385

386 All authors contributed to the ideas, questionnaire and writing the manuscript. All authors gave  
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388

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390

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393

#### 394 **Conflict of interest**

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396 The authors report that there is no conflict of interest.

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Journal Pre-proof



611 **Figure 1.A.** Frequency histogram indicating change of panel members' response as to whether  
612 different technologies were able to improve OA stratification in Round 1 (before the focus meeting)  
613 and Round 2 (after the instructive lectures at the start of the meeting). Nine of the 11 technologies  
614 reached consensus after the 2<sup>nd</sup> round. B. The modified question related to X-ray and ultrasound  
615 technologies for the 3<sup>rd</sup> round for the clinic and research and the % agreement.

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654 **Table 1.** Statements used in the DELPHI and the percentage of participants who agreed with the  
655 statements at each Round.

DELPHI statement/Question		Round 1	Round 2	Modified question for round 3	Round 3	
		Percentage agreement with statement				
1	OA is a disease of i. Bone ii. Cartilage iii. <b>Bone and cartilage</b>	1. <u>2.9</u> 2. <u>5.7</u> 3. <b>91.4</b>	1. <u>3.1</u> 2. <u>0</u> 3. <b>96.9</b>			
2	OA always involves other tissues in the joint in addition to bone and or cartilage	63.9	<b>87.9</b>	<b>OA involves other tissues in the joint in addition to bone and cartilage</b>	<b>100</b>	
3	Early OA needs categorising differently to 'established OA	<b>86.1</b>	<b>87.9</b>	Panel decided not to take this question forward		
4	Osteoarthritis needs re-defining	65.7	69.7			
5	<b>OA is a continuum</b>	<b>88.6</b>	<b>97</b>			
6	<b>Subcategorising OA is useful</b>	<b>94.3</b>	<b>100</b>			
7	The definition of OA needs to be joint specific	55.6	69.7	The definition of OA needs to encompass joint specific differences	66.7	
8	OA phenotypes should rely on underlying mechanisms	73.5	<b>84.8</b>			
9	X-rays alone can be used to categorise OA phenotype	<u>5.6</u>	<u>6.1</u>			
10	The Kellgren-Lawrence (KL) is the most appropriate for categorising OA on X-ray	50	74.2	<b>There is a need for an improved scoring system than the Kellgren-Lawrence for X-rays</b>	<b>93.9</b>	
11	MRI has no role to play in categorising OA	<u>2.8</u>	<u>9.1</u>			
12	A universal OA categorisation system can be used for all clinical cases of OA	44.4	56.3	Panel decided not to take this question forward		
13	The same categorisation system for OA can be used in the clinic and or research studies	57.1	59.4	The same categorisation system for OA should be used in the clinic and or research studies	78.8	
14	<b>The latest technological advances can be used to improve OA subcategorisation</b>	<b>100</b>	<b>100</b>			
15	Please say if you agree or disagree that the application of the following technologies can improve clinical OA subcategorisation <b>Epigenomics</b> <b>Genetic analysis</b> <b>MRI</b> <i>X-ray</i> <i>Ultrasound</i> <b>Metabolomics</b> <b>Proteomics</b> <b>Wet biomarker analysis</b> <b>Machine learning (AI)</b> <b>Activity monitoring</b> <b>Clinical engineering</b>	<b>84.8</b> <b>91.4</b> <b>100</b> <b>82.9</b> 58.8 78.8 <b>87.9</b> <b>97.1</b> <b>88.9</b> 68.6 72.2	<b>87.5</b> <b>97</b> <b>97</b> 48.5 66.7 <b>90.6</b> <b>93.8</b> <b>93.8</b> <b>100</b> <b>90.9</b> <b>87.5</b>		Clinical <b>87.9</b> 75.8	Research 75.8 69.7

16	Different OA subcategorisation	Journal	Pre-proof		
	systems have been suggested in the literature recently. Please say if you agree or disagree with the following statements taken from the literature.				
	A. Examples of OA can be: Hip/knee/hip and or knee <sup>[45]</sup>	58.3	72.7		51.5
	B. Pain, symptoms, clinical examination and X-rays are the most useful factors in diagnosing early OA <sup>[46]</sup>	45.7	36.4		42.4
	C. Pain, psychological distress, radiographic severity, BMI, muscle strength, inflammation and comorbidities are all associated with clinically distinct OA phenotypes <sup>[47]</sup>	60	69.7		51.5
	D. Minimal joint disease, malaligned, biochemical, chronic pain, inflammatory metabolic syndrome and bone and cartilage metabolism are all main phenotypes of OA <sup>[48]</sup>	61.8	72.7		48.5
	E. Knee OA phenotype is defined by patient reported frequent knee pain, cartilage damage and the presence of degenerative meniscal tissue <sup>[49]</sup>	58.8	48.5		39.4
	F. OA can be classified by symptomatic radiographic OA (primary criteria) and pain alone (secondary criterion).	31.4	24.2		36.4

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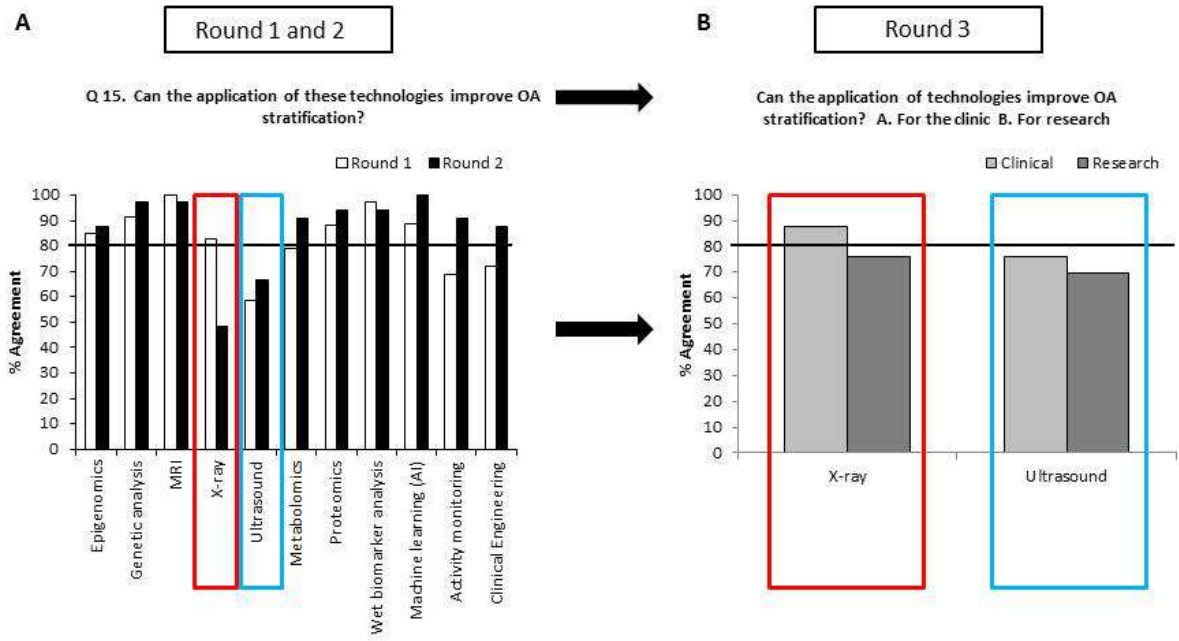
671 Table 2. Definitions of OA from different professions on the Delphi panel.

Profession	OA definition
Physiotherapists	A syndrome affecting the joints of the body
	Joint pathology leading to pain and functional limitation that involves genetics and epigenetic factors
Rheumatologists	Structural alteration of cartilage and bone in a joint which results in pain and loss of function
	A disease of the whole joint with distinct clinical and structural phenotypes
	A disease of many tissues of the joint including cartilage and bone, associated with pain or stiffness
	Osteoarthritis is a whole-joint disease, affecting articular and periarticular tissues. It has components of degeneration, regeneration and low-grade inflammation that differ in extent and clinical consequences between joints, disease stages and patients
Orthopaedic Surgeons	Structural and biological derangement of joint (that isn't rheumatoid/ankylosing spondylosis/psoriatic)
	A painful condition involving changes in multiple tissues of the joint
Engineers	A disease of the joint, characterised by pain, loss of function and degeneration/progressive damage of structures in/around the joint
	Musculoskeletal disease possibly triggered by altered joint biomechanics and biological signalling leading to joint tissue degeneration, inflammation and pain
Radiologist	Degenerative joint change currently based on exclusion of other causes
Vet	Degenerative whole joint disease with an inflammatory component
Scientists (researcher)	Joint disease that results in cartilage degeneration, bone changes and pain
	Degenerative disorder of the joint
	A degenerative disease of the bone and cartilage. Can lead to cartilage loss, joint inflammation, changes in the bone and pain

672 \* The number of comments shown indicates the number of people who provided definitions in each  
 673 profession.

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694 Figure 1.



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