

Whitepaper on Home Health Care In India

**A NATHEALTH Initiative to drive
accelerated reforms in transforming the
Home health care sector in India**

July 2021

NAT⁺HEALTH[®]
Healthcare Federation of India



Draft For Discussion



The Critical Questions we seek to answer in the whitepaper



Why home care?

Why is home healthcare critical to India's healthcare agenda?



Why now?

What is the relevance of home-based care in the current ecosystem?



Why unlock?

What is the potential impact of a thriving home healthcare ecosystem?



How to unlock?

What are the imperatives for this sector to reach its potential?

Healthcare has traditionally been delivered at home...



**Family physicians with
caregiving by family
members & informal
caregivers**

*Present day technology powered,
outcome driven, digitally delivered
beyond-hospital care*



Home healthcare in India is undergoing a paradigm shift driven by changing consumer perception & increasing government focus



Home healthcare including medical & non-medical care delivered by skilled medical professionals

- Greater consumer preference for in-person / institutional health services
- Home care limited to chronic care, post-acute care & senior care

The COVID19



catalysis

A recent study revealed;

- **~70% consumers show a preference to at home services** – teleconsultations & diagnostics
- **30-50% respondents were willing to subscribe** to various home care services



Govt. focus on regulating home-based and remote healthcare delivery

राष्ट्रीय आयुर्विज्ञान आयोग
NATIONAL MEDICAL COMMISSION

The Telemedicine Practice
Guidelines, 2020



NABH* working on digital health
standards for accreditation of
telehealth providers



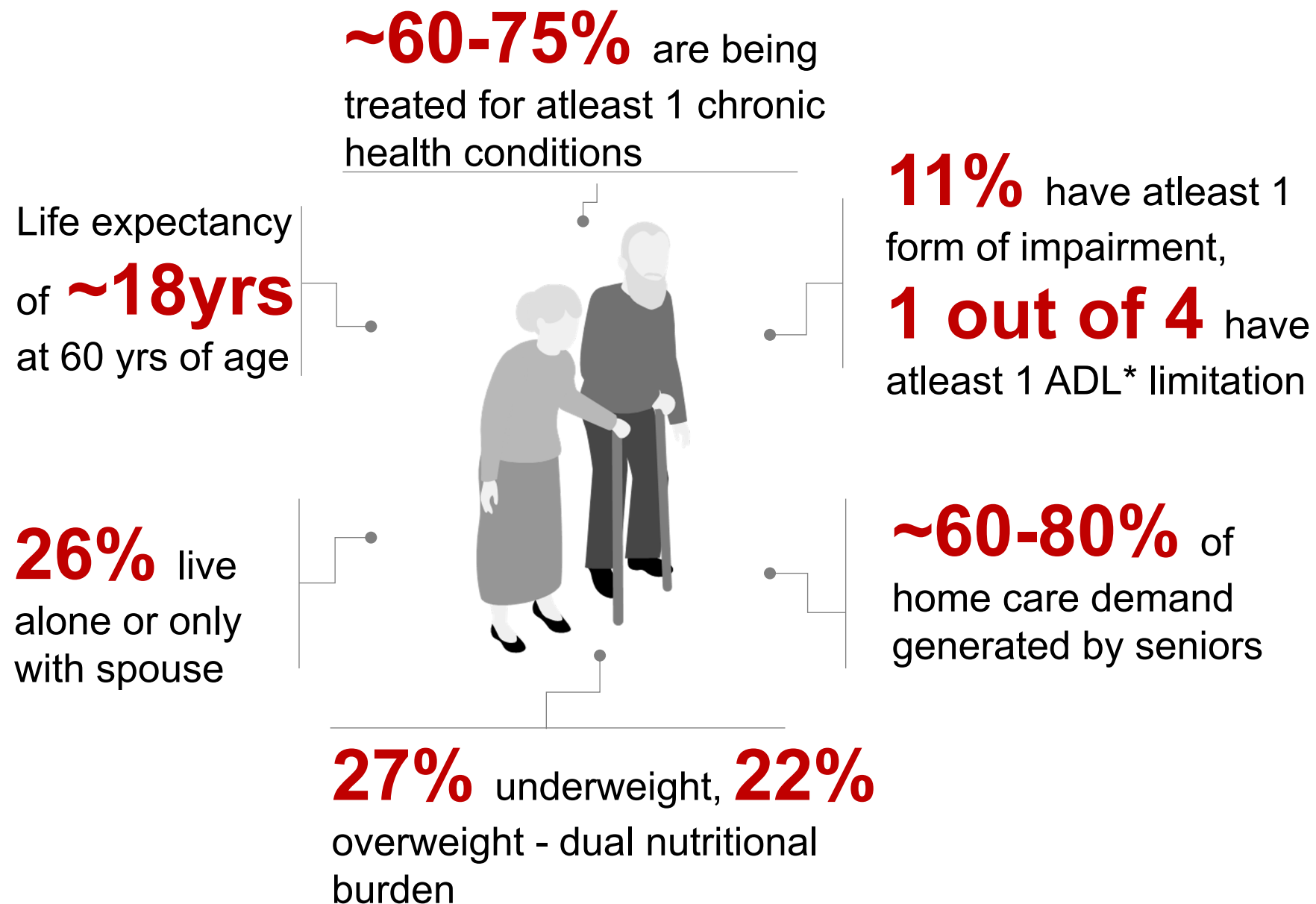
Telehealth model of Aarogya Setu &
fund remote care for Ayushman
Bharat

*NABH - National Accreditation Board for Hospitals & Healthcare Providers

Source: Changing consumer preferences towards health care services: The impact of COVID-19 report, secondary research

Home care has the potential to support the national senior welfare agenda of 'Healthy & Active Ageing in Place'

The Indian Senior



The Indian senior care agenda

Ageing in place – encouraging ageing at home to avoid high cost of institutional care

Improve health status with preventive health, early interventions, disability support & rehabilitative care at home to

promote **Productive & Active & Healthy Ageing**

Reduce healthcare costs & burden on tertiary healthcare infrastructure

*ADL – Activities of Daily Living

Source: LASI Wave1 report 2021, NAPSrC 2020 document, CI senior care industry report India 2018,

With greater integration of technology along with emerging business models, home healthcare will continue to see an increase in demand across the care continuum

Home healthcare today

Category	Components	Growth drivers
Home healthcare solutions	Telehealth & telemedicine	<ul style="list-style-type: none">• Convenience & safety of using telemedicine solutions over hospital visits• Govt. focus & clinician preferences
Home healthcare services	Rehabilitation therapy, Nursing services, ICUs at home	<ul style="list-style-type: none">• Growing ageing population• Changing family structures leading to changing patterns of informal caregiving• Focus on continuity of care
Home healthcare devices	Diagnostic devices, Health screening & monitoring devices, Mobility Aids & Medical Supplies	<ul style="list-style-type: none">• Increased health awareness & focus on preventive health• Improved access to technology solutions• Increasing incidences of chronic diseases

Home healthcare of the future

Home care across the healthcare continuum driving **preventive, promotive, curative & rehabilitative care**



- **Increased demand for preventive & non-medical care** with an increasing ageing population



- **Delivery of acute care in-home settings** – home dialysis, home ICUs, remote monitoring etc.



- **Home care as a part of care continuum of institutional care** – home chemotherapy, rehab at home, post-acute care etc.



- **Insurance coverage** for home-based care

A collaborative approach to support this emerging sector will help unlock the nascent potential of India's Home healthcare marketplace

The COVID Highlight

Business Standard

Home healthcare sees larger role amid Covid-19, seeks insurance coverage

COVID19 TECH IMPACT

#StartupsVsCovid19: As Covid Overburdens India's Hospitals, Home Healthcare Startups Look To Fill The Gap

ET Healthworld

From The Economic Times

Shifting trends from hospitals to home care during Covid-19

Home care is gaining traction during the community transmission phase of COVID 19. A strict regime defined by healthcare experts needs to be followed at home. It will also lessen the financial burden to the family and the Government, as 85% of the infected people do not need active treatment at hospitals.

The Indian EXPRESS

Hospitals are now providing homecare services for COVID-positive patients

Need for a blueprint

Market stewardship & support to players for rapid growth

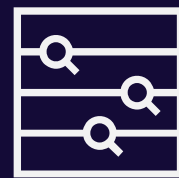
Capability support with skilled workforce & infrastructure

Regulatory framework for providers with minimum standards, licensing guidelines & accreditation to ensure **highest quality of care delivery**

Financing measures & reforms for improved affordability & access to care

Integration into the larger healthcare continuum

Building the 'Home healthcare' blueprint?

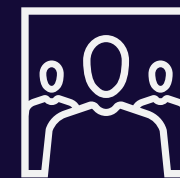


Decode

Understanding and assimilating the “What” & “How” of Home healthcare ecosystem today



- Analyze the Indian Home healthcare ecosystem & its critical components
- Why is it necessary for India?
- What is the future potential for healthcare delivery in India?

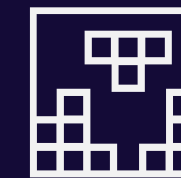


Discuss

What is the challenges & possible solutions for the home care segment?



- What are the challenges this industry faces today?
- Assessing the critical white spaces & solutioning for the same



Devise & Disseminate

What is next & how can it be achieved?



- A recommendation stack of interventions required to unlock potential
- A value map for potential role of home healthcare in solving the key challenges of Indian healthcare

The Kickstarter strategy*

Key stakeholder mapping

Building stakeholder consensus on recommendations

Focused promotional interventions

The document will accurately define beyond-hospital care, highlight the role & demonstrate the potential of care delivered outside hospitals in advancing India's healthcare agenda

Objective 1

Objective 2

Objective 3

Objective 1: Establish the current state paradigm

- ▽ An **in-depth scan to assess** Indian home healthcare ecosystem - **enablers driving & transforming the home healthcare space**, growth levers & challenges
- ▽ **Detailed study of the advanced home healthcare models globally** & identify critical factors to derive key learnings.
- ▽ Exhibit the role played by home healthcare so far & **establish future function of home healthcare in the Indian healthcare continuum.**

Objective 2: Build the value proposition & demonstrate potential

- ▽ **Conduct meaningful conversations & impactful debates** to understand & assess the key building blocks of the home healthcare
- ▽ Establish the '**value proposition**' of home healthcare and it's '**role**' in solving challenges of Indian healthcare system in key emerging segments like senior care & welfare, cancer care etc.
- ▽ **Formulation & validation of the key hypothesis** with detailing of key missing links, white spaces, bottlenecks & gaps in the existing home healthcare ecosystem

Objective 3: Create Impact to activate conversations

- ▽ A '**Thought leadership paper**' that defines;
 - Role of home healthcare in the larger Indian ecosystem with an **impact driven benefits** of developing the home healthcare ecosystem



Objective 1: Establish the current state paradigm

Objective 1

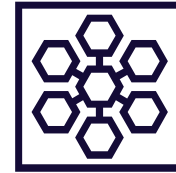
Objective 2

Objective 3



Deep dive into the Indian home healthcare provider space

- **Define the components** of home healthcare
- The **existing business models** and modes of care delivery - services, solutions and digital players
- **Role** of care providers **during the pandemic**
- Home healthcare as a part of the **current healthcare continuum**



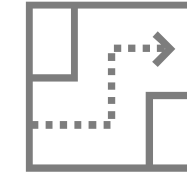
The larger ecosystem beyond the provider network

- Identify the **building blocks** for a high performing care ecosystem
- **Headwinds & tailwinds, growth levers, existing & potential challenges.**
- Shortlist of **critical success factors & key challenges** – possible solutions for each



Home healthcare across the globe

- **Identify governance, financing and regulatory best practices**
- Understand the **emerging trends** in home healthcare across the world
- **Evaluate** the best practices on **fitment to Indian scenario**



The Outcome

- Demonstrate role of home healthcare as an **integral part of Indian healthcare system**
- Exhibit & enumerate the **contribution of home healthcare** to the Indian healthcare ecosystem
- Possible **avenues of enhancement** of the role of home healthcare in the healthcare continuum

Objective 2: Build the value proposition & demonstrate potential

Objective 1

Objective 2

Objective 3

Conduct meaningful conversations & impactful debates*



Home healthcare service providers

- Need for a regulatory framework, licensing standards & quality standards
- Evolving care models & interventions to support development of the same
- Challenges faced & possible solutioning for the same



Hospitals

- Creating an integrated continuum of care – challenges & possible solutions



Insurance & other payors

- Challenges in current financing mechanisms
- Recommended solutioning for comprehensive financing of care for all



Digital home health players

- Understand role of digital at-home healthcare delivery
- Govt. interventions for enabling greater reach



Med tech payers

- Role of med tech players in solving challenges in home healthcare
- Policy interventions necessary

The Outcome

- Establish **value proposition** for home healthcare in healthcare delivery in India
- Identify **home healthcare solutions for key challenges of Indian healthcare** system in key emerging segments like senior care & welfare, cancer care etc.
- A **comparative of current & desired state to identify** key missing links, white spaces, bottlenecks & gaps in the existing home healthcare continuum

Objective 3: Create Impact to activate conversations

Objective 1

Objective 2

Objective 3

The 3 Core themes

Theme 1

Regulatory & policy reforms

- Robust, fair & participative **regulatory framework components**
- Interventions for **growth of the home healthcare economy/marketplace**
- **Emerging models** & regulatory support

Theme 2

Financing of care for all

- Financing of care for all – tax funded & insurance based
- Financing enablers - funding support, tax benefits

Theme 3

Capacity Building for the future

- Initiatives around manpower & infrastructural capacity building
- Interventions to augment digital capacity to maximize on opportunities

*Establish home healthcare as a **critical pillar of the Indian healthcare system** with the potential to solve key challenges of the system*

*An **impact focused framework for reforms** and support to the beyond hospital care ecosystem*

- **Actionable recommendations** with high relevance to the Indian context
- **Impact quantification to demonstrate potential** by using metrics defined as;
 - Lives impacted
 - Jobs created
 - States / districts covered etc.
- Supported by **relevant global or domestic proof of concept** & evidence of success

The **4** levers for sustained impact

An engagement plan that ensures a 360° view of the ecosystem with early interactions & continued commitment

- *A focused list of key stakeholders at the start*
- *Questionnaire design for targeted & productive discussions*
- *Group interactions & brainstorming during fortnightly meetings*
- *Interactions & contributions of change influencers to the final whitepaper*

1 The core committee

The driving force with representation from all components of the ecosystem

2 KOL Interactions

Key opinion leaders' expertise & experience to help reinforce & validate viewpoints

3 Change Influencers

Early engagement of policy drivers to enable steering the recommendation imperatives

4 An open feedback loop

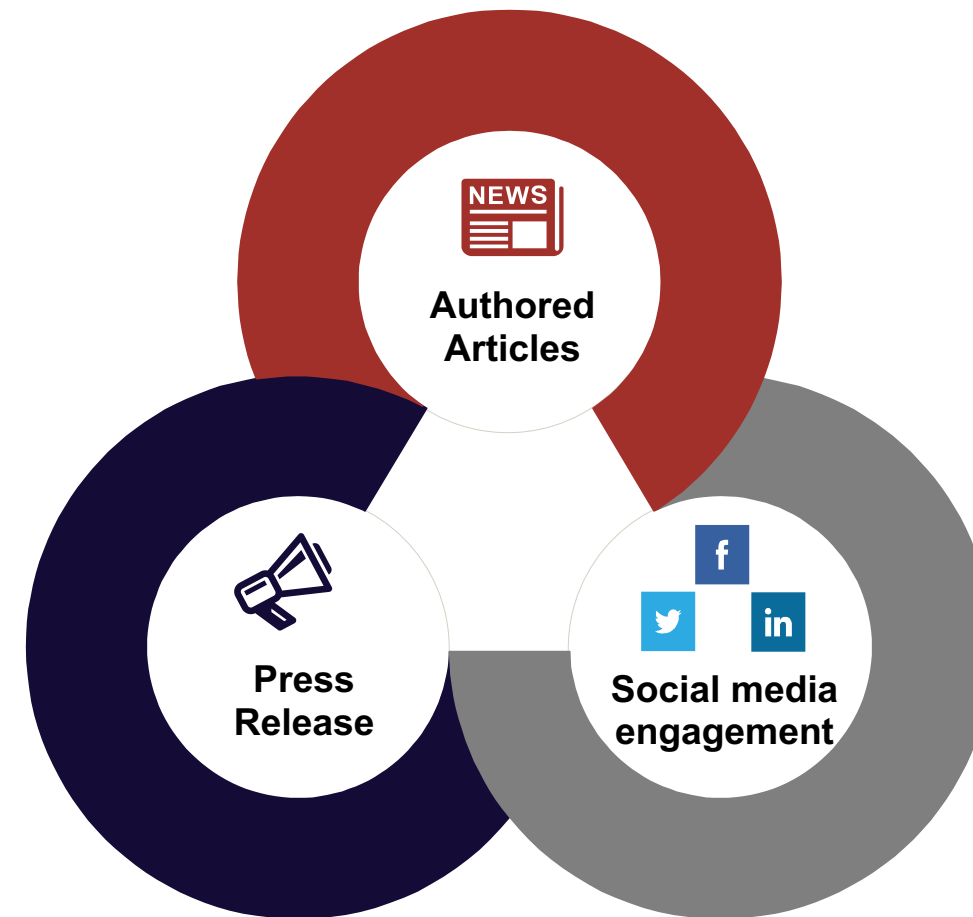
Periodic circulation of draft versions for active feedback gathering & sharpening point-of-view

A media & communications strategy with targeted interventions to amplify messaging around reforms for home healthcare in India *

Illustrative initiatives

- Series of articles authored by industry opinion leaders on key home healthcare themes and recommendation areas

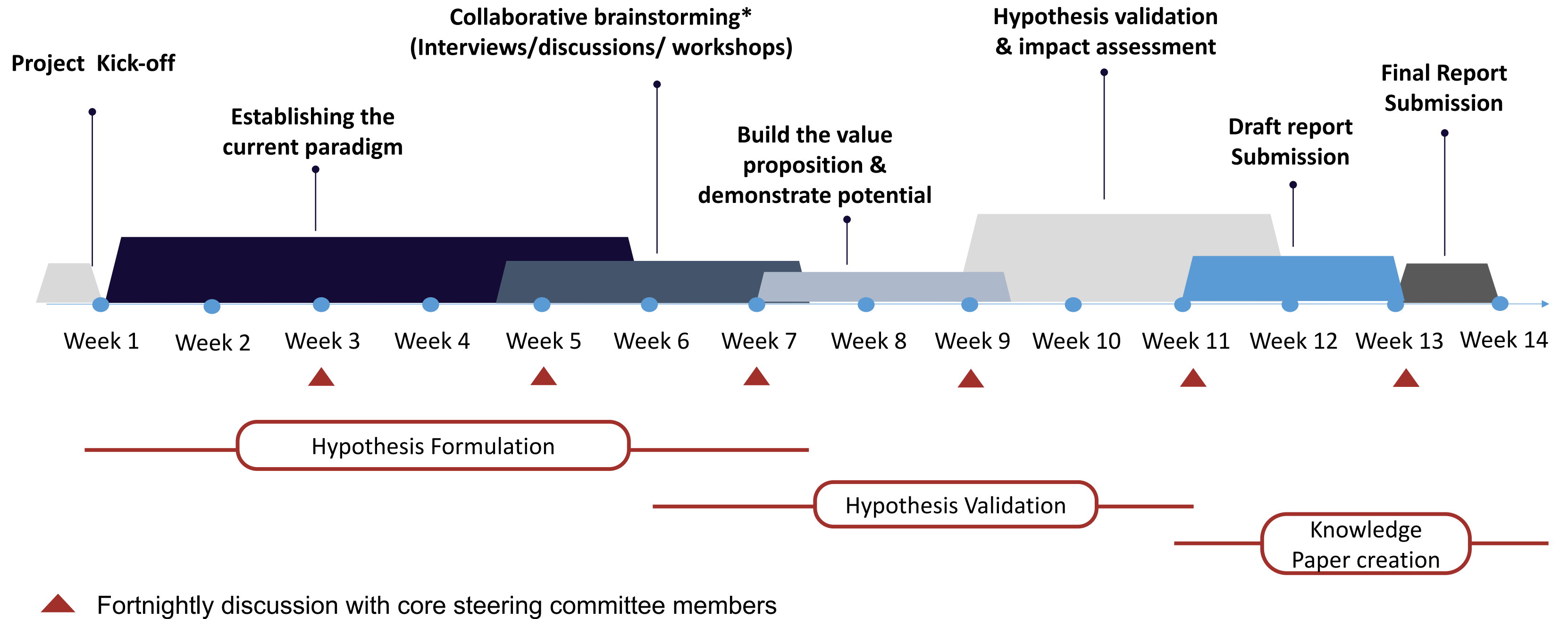
- Dissemination via a press release capturing the key recommendations, alignment with Government policy and way forward through key stakeholders
- Panel discussions and/or roundtables in partnership with media portals



- Amplifying content via articles & press interactions on prominent social media handles
- Hashtags, blogs & posts to sustain momentum
- Online panel discussions / webinars

* To be executed in collaboration with a media & communications partner

We envisage a timeline of 12-14 weeks





Thank You

*Looking forward to
working together!*