

# Southern Region Healthcare Dialogue: Healthcare Priorities of Telangana & the Way Forward

Faster. Stronger. Together.



Organized by NATHEALTH  
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# Introduction

NATHEALTH's Southern Region Healthcare Dialogue was organized at Hyderabad under the theme of "Healthcare Priorities of Telangana & the Way Forward". The event witnessed huge participation from the healthcare sector of the region. The session focussed on various priority areas in healthcare.

The event fits well with NATHEALTH's 3.0 agenda and its focus areas for the development of India's healthcare sector - infrastructure expansion, digital health, healthcare innovation, globalizing India's healthcare, and Aarogya Bharat (health system evolution). Achieving these objectives at a state level requires reaching out to the state stakeholders - the event was a step in this direction.

The Federation is centrally located in the healthcare system wheel, and is a perfect culmination of players from all walks of the healthcare sector, including providers/hospitals, labs/diagnostics, medical equipment manufacturers, investors, payors, digital health providers, not-for-profit education institutions and also supply chain players. It is the only national body that works exclusively for players within the healthcare ecosystem.

## **Faster, stronger, together**

NATHEALTH believes in a collaborative approach, and thus shares symbiotic relationships with other industry associations as well. The Federation delivers outcomes through a unified voice in healthcare policies and works in the interest of players who facilitate on-ground delivery of services.

NATHEALTH's mission is to be a valued partner to the Government and the private players, for developing an improved healthcare system in India. It provides regular feedback to the Government (Union and States) and works continuously with the private players - bringing everyone on the same platform.

This partnership has become stronger while battling the Covid-19 pandemic. Various key policy decisions were formalized and implemented as a result of consultations and discussions between NATHEALTH, its stakeholders, and the Government.

Such a partnership between the industry, the industry bodies, and Governments has been helpful in developing policies, which has made a huge impact on the management of the pandemic across the country. Further, to cater to the requirements of certain policies at the state level, NATHEALTH works together with regional bodies in the four key regions of the country.

## **A vision for state-focussed healthcare development strategy**

To take the said mission ahead, NATHEALTH has now launched a drive to work with various Indian states, their stakeholders, and their Governments for a collaborative healthcare development strategy.

NATHEALTH's Southern Region Healthcare Dialogue is the first event in the series, and was implemented with the idea of taking feedback and understanding the requirements of different players within the healthcare ecosystem. The next step for NATHEALTH is to develop an approach for working with the state Government to improve the delivery and access to healthcare, and create a healthy and prosperous society.



# Development of a state-level healthcare plan

- Infrastructure growth as an extension of India's overall healthcare strategy
- Digital health as a priority
- Start-up led innovation
- Globalization to make India an epicenter of healthcare solutions
- Public private partnerships as a priority for Aarogya Bharat
- NATHEALTH's role as the unified voice of healthcare

## Development of a state-level healthcare plan: Focus areas & role of stakeholders

### Infrastructure growth as an extension of India's overall healthcare growth strategy

NATHEALTH's focus areas are an extension of India's overall healthcare growth strategy, one of it being infrastructure development with the following prominent markers:

- Expanding healthcare capacity - especially healthcare delivery capacity post-pandemic.
- Infrastructure growth & optimization.

To achieve these markers, the roles of industry stakeholders and the state Governments need to be charted out clearly and aligned well.

### Digital Health as a priority

One of the things that the Southern Chapter of NATHEALTH takes up as a priority is digitization in healthcare. It is mainly because the Government of India is driving digitization on a large



### Dr. K Hari Prasad

**President, Hospital Division, Apollo Hospitals Enterprises Limited and  
Chair, South Chapter, NATHEALTH, while giving Opening Remarks**

*This event is the first in the series of NATHEALTH's regional events. The Southern Region Healthcare Dialogue focussed on taking sectorial feedback and understanding the requirements of different players within the healthcare ecosystem. The next step for NATHEALTH is to develop an approach for working with the state Government to improve the delivery and access to healthcare, and create a healthy and prosperous society.*



**Sri Jayesh Ranjan**

**IAS, Principal Secretary, Industries and Commerce & Information Technology, Government of Telangana**

*The state looks at NATHEALTH as an expert in advocacy for the sector. While Telangana is ahead in many parameters, we still have a long way to go to achieve global numbers. NATHEALTH can be our partner in the journey, along with other stakeholders, including the private sector.*

scale, and NATHEALTH understands its value for the providers and the industry. Multiple initiatives have been pushed through to make India a better digital healthcare system that will leave a big impact on overall healthcare delivery.

It will benefit every organization and individual associated with the healthcare industry. India is looking at a very close future where, for example, a patient with a PHR can access and read the PHR easily on his phone - irrespective of the doctor or hospital visited, his records can be available on the phone and accessible from anywhere in the world. Propositions like these have the

capacity to make a huge impact on the care that can be provided to an individual.

In many countries around the world post-pandemic, the average wait time to see a patient has now grown five times to ten times more. This is where digital health can be a game changer. Digital health interventions can be adopted rapidly by all the stakeholders, and can be a pivot around more innovative delivery. It can revolutionize the way India deals with NCDs and chronic disease management. Digital health can also be used to overcome supply-side barriers, like skill building, training, and quality enhancements.



The audience during the event was an active participant throughout

### Start-up led innovation

Innovation is one of the major focus areas of India and NATHEALTH. Along with developing start-up-led innovation, it is important to understand how NATHEALTH can better facilitate the start-up industry's conversions and intersections. Ultimately, forming a start-up perspective that opens up access to markets, and commercialization pathways that run through the NATHEALTH community.

### Globalization to make India an epicenter of healthcare solutions

The industry players now start planning on making India an epicenter from which global solutions can develop. Like the Indian IT sector, there is a future opportunity for India to be a location from which global medical travel, data analytics, and full-stack

medical value travel could be delivered.

### Public private partnerships as a priority for Aarogya Bharat

Working hand in hand with the Government under public private partnerships and strengthening healthcare systems, whether it's financing, delivery, or innovations - will go a long way toward healthcare delivery improvement. NATHEALTH tends to engage closely and collaboratively through thoughts and leadership research, lighthouse demonstration programs, and information-led campaigns for better awareness of good behavior in healthcare.

The said focus areas are as important for Telangana's healthcare system, as they are for the entirety of India. It is time to step up the efforts of all stakeholders from

“ Like the Indian IT sector, Indian healthcare industry too has a wonderful opportunity to make India a destination of global medical travel, data analytics, and full-stack medical value travel. Telangana presents itself as one of the most prominent players on this front



**Ms. Anu Acharya (L) Founder & CEO, Ocimum Bio Solutions & Mapmygenome, and Co-Chair, South Chapter, NATHEALTH; Dr. K Hari Prasad (C), President, Hospital Division, Apollo Hospitals Enterprises Ltd. & Chair, South Chapter, NATHEALTH; and Mr. Siddhartha Bhattacharya (R), Secretary General, NATHEALTH**

all directions to elevate the healthcare status of Telangana – to collaborate, to become stronger and to grow faster.

### **NATHEALTH's role as the unified voice of healthcare**

NATHEALTH has a unique blend of stakeholders that covers the entire breadth of the healthcare ecosystem. These organizations are a part of NATHEALTH through a powerful collaboration network - both in India and outside - with multilateral organizations. NATHEALTH overarching objective

is to focus on end-to-end issues that affect consumers. Additionally, NATHEALTH has an increased level of senior management participation, which results in high traction of leadership interventions and guidance.

The role of NATHEALTH is clear - a unified voice that shapes India's health system by owning and contributing to the strategic healthcare agenda.





# Healthcare Priorities of Telangana state - at a glance

- Boosting the state's current healthcare strengths - life sciences, pharma, biotech & more
- Need for Government push towards healthcare advancements - medical device parks, manufacturing, pharma cities & more
- Higher priority to infrastructure development
- Capacity & skill building through medical colleges, job creation
- Strengthening diagnostics & primary care
- Elevating digital health for public health, data analytics
- Incubators and accelerators - building up the start-up community with help from Government & private players

## Healthcare Priorities of Telangana state

### **Boosting the state's current healthcare strengths**

Hyderabad has witnessed huge advancements in the healthcare and life sciences sector in the last few years, and private players have played a major role in this success. The city has an advanced pharma and biotechnology sector, with a special focus on the vaccine industry. Almost 40% of India's pharmaceutical products are manufactured in Hyderabad, and the city has the world's largest number of FDA-approved labs.

### **Need for Government push towards healthcare advancements**

To give a bigger push to the pharmaceutical sector, the

Telangana Government has plans to set up a new pharma city. Once built, it will have the world's largest pharma cluster. In the past five years, the Telangana Government has also given high prominence to the medical device sector. It has created an enabling infrastructure and supportive policies for medical device manufacturing. The result is that some of India's and the world's leading companies now have plans to open their manufacturing units in Telangana.

### **Higher priority to infrastructure development**

In the last few years, the Telangana Government has increased its attention on the development of



**Mr R Govind Hari Chairman and Managing Director Pushpagiri Eye Institute**



**Dr. Suresh Kumar, Associate President - HR & COE, Aurobindo Pharma**

healthcare infrastructure. This event was a case in point, where several public and private players came together to further strategize the improvement of the healthcare infrastructure of the state. NATHEALTH's focus on infrastructure development gels right with the Telangana Government's momentous decision to set up multi-specialty hospitals.

### **Capacity & skill building through medical colleges, job creations**

The Telangana Government has considered the crisis of medical students of Indian origin studying in Ukraine and Belarus, and has thus decided to set up medical colleges in every district of the state, to increase the vacancies for future doctors and medical practitioners. Such an initiative is a boost to healthcare capacity and skill

building in the state. Again, this is one of the key focus areas of NATHEALTH as well, and a mission that can be achieved with collaborative efforts from NATHEALTH and Telangana Government.

### **Strengthening diagnostics & primary care**

The Telangana Government has launched an initiative called T-diagnostic, under which, the Government has set up various labs in every hospital of the state and every tertiary care center of the state. There are 67 kinds of tests that can be potentially carried out and will be free of cost. Similar attempts have been made to strengthen the PHCs, the sub-centers, and to provide better training to the healthcare workforce at these centers.

“ In the past five years, the Telangana Government has given high prominence to the medical device sector - by creating enabling policies to support infrastructure and medical device manufacturing. As a result, some of India's and the world's leading companies are planning to open their manufacturing units in Telangana



**An engaged audience at the event**

with NATHEALTH's strength of diagnostic members and skilling partners, the Federation is well-placed to be a strategic partner for the state.

### **Elevating digital health**

Along with the National Digital Health Mission (NDHM), Telangana has started a digital health pilot program in two districts of Sircilla and Mulugu. Under the program, a door-to-door survey that helps in collecting vital health data is undertaken on 60 health parameters. Based on the survey results, data analysis of a bigger community shall be undertaken. For example, a large number of tribal communities live in the Mulugu district, and data analysis will be conducted to understand if there is any particular disease pattern,

which tribals show that other communities do not. Based on this, a healthcare plan can be rolled out for the region.

Digital health is a key priority for NATHEALTH as well, and the Federation already has working relations on various digital health initiatives with the Union Government and digital health providers. This lays the foundation for a fruitful partnership to flourish between the state and NATHEALTH.

### **Incubators and accelerators - building up the start-up community**

NATHEALTH is an industry leader where start-ups are concerned. It started building up the start-up community a few years back, which

places NATHEALTH in a leadership position and at the forefront of the initiative. Telangana Government too, encourages start-ups, and this mutual focus opens up new pathways for a way forward on this agenda - for NATHEALTH, the Telangana Government and other stakeholders to work collaboratively. Currently, there are 57 incubators,

accelerators and T hubs in the state. In these T hubs, there is a distinct focus on health tech, and the Government is helping startups by providing them access to Government hospital POC data, by mentoring, and through fund assistance. The state of Telangana has one of the most enabling environments for start-ups.



“  
Telangana has started a digital health pilot program in two districts of Sircilla and Mulugu. Under the program, a door-to-door survey that helps in collecting vital health data is undertaken on 60 health parameters.

**Ms. Anu Acharya**

**Founder & CEO, Ocimum Bio Solutions & Mapmygenome and Co-Chair, South Chapter, NATHEALTH, while giving Closing Remarks**

*The event has given a comprehensive overview of the healthcare scenario in Telangana. We are all a part of the growing interest and encouragement that we are getting from the Government. I am glad that today we spoke about many aspects, including preventive care, medical devices, hospitals, infrastructure and more. It is now up to the sector to use the available infrastructure and built on the current incentives, to find the right solutions. NATHEALTH is an organization that connects a lot of dots in the healthcare ecosystem of India. If we all come together on the same platform along with NATHEALTH, we can easily bring many resolutions for the state.*

# Active Audience Participation



**Dr. Rajiv Chhibber**  
Vice President, External Affairs  
Sahajanand Medical Technologies. Ltd.



**Dr. Karunakar K**  
Dr. Reddy's Laboratories



**Dr. Hemanth Kaukuntla**  
Cardiothoracic Surgeon  
Century Hospital

## Comments & Suggestions

### → On the development of Medical Parks

In the entire ecosystem, which has been developed in the country, there are four medical device parks announced by the Government of India. There is an existing park in Telangana too. The entire PLI scheme is expanded to other areas as well. The idea behind the production link is to expand into export, while India has a lot of imports. To achieve this, one important component is to strengthen the CFCS in most of the medical device parks, which is easier to achieve. Everyone would benefit from the same. The medical parks should also house bio material accelerators, AGS testing labs, solid waste management labs, common warehouses, adequate logistics, emergency response systems, and facilitate ITI training. The bigger medical parks should be categorized as SEZs (special economic zones). This change will push the export agenda forward.

### → On MedTech Policy

NATHEALTH Secretariat elaborated on the MedTech Policy by the Government of India. It explained how NATHEALTH has gathered stakeholder suggestions on the Policy and how they are being discussed with relevant Government offices regularly. NATHEALTH has also submitted its collated recommendations on the draft Policy.

The medical parks are also a part of the overarching Policy.

#### **Points to ponder on the MedTech Policy:**

- What should be the minimum infrastructure required by an SME?
- How to articulate the benefits accruing from the expansion of the ecosystem?
- How to create a template for multiple states to follow?
- How to ensure a multiplier effect?
- How to validate the process for start-ups?

# Active Audience Participation



**Dr. Balaraju Naidu**  
Founder & Managing Director  
Onus Hospitals



**Dr. Prashanth**  
Rainbow Children's Hospital



**Mr. Prabhdeep Singh**  
Founder & CEO  
Stanplus

## Comments & Suggestions

### ➔ On difficulties of Cashless Facilities

As per the hospital representatives in the audience, many providers in Telangana are facing issues with the non-viability of tariff rates of cashless schemes in the state (like Aarogyasri, EHS, BDL, NMGC, etc.). It was suggested that NATHEALTH play a role in standardizing the rates under such schemes, while also enabling a regular upgrade (Say every 2 years).

#### ***More suggestions on cashless facilities:***

- Universal Health Card for all cashless schemes (there are around 60-70 schemes).
- A single window system for entrepreneurs who want to start a hospital / Health City.
- Removal of inconsistency in insurance payouts to hospitals.

#### ***Roadblocks raised by audience in Cashless Facility payouts:***

- A universal card might not be possible as health is a state subject and the schemes are a mix of national & state-specific schemes.
- Price capping is not taking place as different agencies have different payment systems with different rates. TPA regulators should be brought into the discussion to bring more uniformity.

### ➔ On the Start-up Ecosystem

The audience was of the opinion that a far lesser number of start-ups are robust enough to be partners with industries. Start-ups generally have three possible outcomes: either failing, acquisition, or becoming a leader. In all the cases, start-ups will surely add value to the system.

- Start-ups with market access and mentors have lower risk of failure.
- NATHEALTH can create a start-up platform, which is robust and has large scale.
- NATHEALTH is working closely to create structures & manage leading start-ups.

## Growth areas to work collaboratively

# NATHEALTH & the state of Telangana

The session mentioned the state of Telangana's improved metrics on IMR, MMR, and nutrition status of the children, although, there is always room for improvement. The event opened up dialogues for further developments, which are collated here.

Globalization & lessons from advanced healthcare systems.

Improving access and connectivity to tertiary care services.

Ease of doing business (single window systems, favorable policies).

Understanding the challenges of rural patients.

Improvement on disease management pathways.

Increased insurance coverage.

Promoting preventive healthcare (Yoga, fitness, nutrition).

Focus on primary healthcare.

Building the supply chain with warehouses, and logistics.

Creating adequate training mechanisms.

Developing a start-up scenario, lowering the risk of failures.

Developing a patient-centric approach.

Increased focus on personalized medicine, cell & gene therapy.

Developing more SEZs, strengthening CFCS in medical device parks.

Standardizing cashless rates & upgrading at regular intervals.



## A glimpse at the event proceedings



# Key Priorities of NATHEALTH

NATHEALTH 3.0 - Shaping India health system by owning and contributing to strategic healthcare agenda

## Infrastructure Expansion

- De-congesting, de-bottlenecking institutions
- Affordable care expansion in Tier II-IV (new business models, tech-enabled, partnership Govt/Private, private-private, etc.)
- New models of care (out of hospital, step down, urgent, ambulatory care, specialty care expansion, home care, etc.)
- Delivery innovations

## Digital Health

- Tech infra, solutions: IT backbone/ Interoperability / tech stack; HIS/EMR; Health ID, Disease repository, analytics
- Access expansion (virtual care, discovery platform)
- Integrated care enablement, coordination
- Platforms- Bridging the gap between large and small players in the fragmented health ecosystem

## Healthcare Innovation

- Start-up ecosystem enablement
- Partnership models (Corp VC, financial investors, strategic partnership, etc.)
- Setting up Healthcare accelerators, incubators
- Atmanirbhar for healthcare products and devices in India (value focused); design and Make in India

## Globalizing India's Healthcare

- Medical Value Travel: unleashing potential
- Global Supply Chain Integration
- India for global healthcare delivery (remote monitoring, virtual care delivery, etc.)
- India as data/analytics hub (payers, providers, etc.)
- Alternative medicine expansion

## Aarogya Bharat (health system evolution)

- New financing models (capitation, performance-based, strategic purchasing, etc.)
- Preventive, public and population health
- Universal health expansion, New models: value-based care
- Disease management (NCD, MCH, etc.)
- Standardized Guidelines, accreditation
- Skilling and education expansion (asynchronous training, CME, upskilling, etc.)

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Dr. K Hari Prasad, South Region Chair NATHEALTH and President Hospital Division, Apollo Hospitals

Dr. Y. Subramanyam, CEO, Apollo Hospitals

Dr. Veera Prakash, Medical Superintendent, Apollo Hospitals

Mr. Mallikarjun K, Corporate Affairs, Apollo Hospitals

Ms. Savithri Kulkarni, Executive Secretary to Dr. K Hari Prasad, Apollo Hospitals

**We thank all our participants**

Participant	Organisation
Mr. Capri Jalota	AIG Hospital
Dr. Prabhakar Rao	Indo American Hospital
Mr. Srinivas T	Prasad Hospitals
Dr. Prashanth	Rainbow Children's Hospital
Dr. Hemanth Kakuntala	Century Hospital
Mr. Sreekumar P	TCD
Mr. Govind Hari	PVRI
Mr. Ravi Babu	Apollo
Dr. Srinivas Rao	Medskills
Mr. Anand Wasker	Apollo Clinic
Dr. Subodh Kandamurtan	ASCI Healthcare Education Division
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Dr. Deepa Agarwal	Apollo Cradle
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Mr. R Dalip Singh	BIACH
Ms. Appaji Nancy Amelia	Nurseme Cares Pvt Ltd
Mr. D Krishna Reddy	Nurseme Cares Pvt Ltd

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