

NAT+HEALTH[®]
Healthcare Federation of India

CHENNAI Roadshow

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Healthcare Priorities of Tamil Nadu & Ways Forward

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NATHEALTH orchestrated its third Southern Roadshow in 2023, hosted on July 27th at The Evolve Hall in The Westin, Velachery, Chennai, Tamil Nadu. The event was the first NATHEALTH Roadshow in Tamil Nadu, and witnessed a healthy participation of 100+ industry stakeholders. The event's theme centered around **"Healthcare Priorities of Tamil Nadu & Path Forward,"** fostering discussions that aimed to devise effective strategies to tackle the pertinent healthcare challenges confronting the state. The gathering facilitated a robust discourse in Chennai, fostering a potent healthcare narrative to align both the industry and the state towards realizing Tamil Nadu's healthcare aspirations.

Heading the Roadshow was Ms. Preetha Reddy, Vice Chairperson of Apollo Hospitals, Past President of NATHEALTH. Co-chairing were Mr. Shravan Subramaniam, Senior Advisor at Premji Invest, Immediate Past President of NATHEALTH, and Ms. Anitha Niranjana, Director at GHA, Co-chair of NATHEALTH's South Chapter.

Adding significance to the event, **Mr. Gagandeep Singh Bedi, IAS, Principal Health Secretary of the Tamil Nadu Government**, delivered a special address. The NATHEALTH secretariat was represented by Siddhartha Bhattacharya, Secretary General; Ms. Anwesha Pandey, Senior Deputy Director; Ms. Vrinda Chaturvedi, National Lead; and Dr. Pushpa Prasad, Southern Regional Lead.

The event session encompassed an open forum where the audience engaged in discussions about healthcare challenges. The session was moderated by Mr. Rana Mehta, Healthcare Partner at PwC.



Key Highlights From the Chennai Roadshow

- 1. Recognizing Tamil Nadu's Healthcare initiatives:** Recognition of Tamil Nadu's trailblazing healthcare initiatives such as MTM (Makkalai Thedi Maruthuvam) for NCD management, Innuyir Kappom Thittam for road traffic accident hospitalization, and commendable healthcare financing endeavors for the underprivileged.
- 2. Patient Empowerment:** Emphasis on empowering citizens to manage their health, early disease detection, curbing out-of-pocket expenses, reducing infant and maternal mortality rates, enhancing smart health infrastructure, advancing digital healthcare models, comprehensive training for personnel, and fostering healthcare entrepreneurship, all pivotal in shaping our collective future.
- 3. Adapting Telemedicine:** Exploration of telehealth, virtual care, and patient engagement through digital health tools for effective onboarding and user experience design.
- 4. Digital Health & AI:** Deliberation on innovative digital health integrations and their disruptive technologies encompassing AI, remote monitoring, and digital therapeutics.
- 5. GST & Advocacy:** Examination of regulatory and legal considerations, particularly reconsidering the exempt nature of healthcare services from GST for input tax credit benefit, and rationalizing healthcare establishment heights for capacity optimization.
- 6. Partnerships and Collaboration:** Stressing the importance of partnerships and collaboration, underscoring successful models between healthcare **startups**, providers, and regulatory bodies to foster digital healthcare innovation and ecosystem integration.
- 7. CSR:** Advocacy for CSR initiatives and partnerships with taluka Hospitals in Tamil Nadu.
- 8. Healthcare Financing:** Exploration of pricing implications and policies that pose risks to healthcare providers.

Participating Stakeholders

 **Providers**

 **Financial Institutions**

 **Diagnostic Players**

 **Think Tanks & Healthcare Consulting Firms**

 **Senior Care Providers**

 **Pharmaceutical Companies**

 **Insurance Providers**

 **Quality & Accreditation Boards**

 **MedTech & Manufacturing Companies**

 **HealthTechs**

 **Start-Ups**

 **Biotechnology Players**



Special Address





Mr. Gagandeep Singh Bedi, IAS
Principal Health Secretary, Tamil Nadu Government

Tamil Nadu's healthcare prominence was reflected in its 36 operational medical colleges, the highest nationwide, 37 government district headquarters hospitals, 256 taluk and non-taluk hospitals, 62 hospitals affiliated with government medical colleges, 2286 primary health centers, and over 8713 sub-centers. This formidable infrastructure extended to two super-specialty hospitals. The government system catered to the healthcare needs of the population of 70.5 crore individuals, handling a substantial daily influx of outpatient and inpatient cases.

The private sector has played a pivotal role, positioning Tamil Nadu as a global medical tourism destination. Collaborative efforts have addressed gaps, including NCD prevention, trauma care, infectious disease management, healthcare financing, taluk hospital enhancement, digitalization of health records, technology training, and in reducing maternal and infant mortality rates.

The integral synergy between the private and government healthcare sectors is pivotal for comprehensive healthcare solutions in Tamil Nadu. This collaborative model is poised to yield enhanced outcomes, serving as a promising blueprint for the nation's healthcare enhancement.

Several crucial aspects can be aimed at enhancing the healthcare scenario and infrastructure in Tamil Nadu. These mainly encompass:



1. Addressing Non-Communicable Diseases (NCDs): A strict focus is required on NCD screening, covering BP, diabetes, hypertension, breast, and cervical cancer. The government has already run a proactive campaign involving women volunteers conducting home visits and referring cases to nearby Primary Health Centers (PHCs), with a call for awareness and potential CSR program support.

2. Emergency Care: Another area that can be enhanced in the state. So far, the government has created an initiative centered on trauma care, accidents, and injuries, with 688 empaneled hospitals, including around 75% private ones. The government covers the first 48 hours of hospital charges, aiming to promote empanelment and collaborative efforts.

3. Battling Infectious Diseases: A communication campaign to raise awareness about infectious diseases, emphasizing patient safety and proactive measures is the need.

4. Mitigating Out-of-Pocket Expenses: This involves expanding the empanelment of the government's social insurance program to alleviate out-of-pocket expenses, featuring awareness dissemination, preauthorization education, and patient guidance for streamlined claims.

5. Strengthening Taluk Hospitals: To strengthen these last mile healthcare delivery, there's a need of government-backed efforts to enhance taluk hospitals' capacities, incorporating better infrastructure and staffing. Private hospitals' Corporate Social Responsibility (CSR) engagement actions can be merged with infrastructural improvement, equipment donations, and relevant collaborations.

6. Advancing Digital Health Records: To strengthen the digital infrastructure of the state, swift progression towards comprehensive ABHA ID registrations, coupled with the transfer of knowledge regarding hospital information systems, potentially through a digital leadership program can be strategized.

7. Training in Cutting-Edge Healthcare Technology: Collaboration with NATHEALTH can be planned to provide advanced technology training to paramedical staff and nurses. The utilization of private sector expertise in technology can be a game changer to enhance training methods.

8. Reducing Maternal and Infant Mortality: Private healthcare's role in diminishing Maternal Mortality Ratio (MMR) and Infant Mortality Ratio (IMR) through patient education, awareness, and efficient care is an area that should be explored.

Audience Interactions





The audience interaction session was led by
Dr. Rana Mehna, Partner & Leader Healthcare, PwC Services LLP

The event saw participants engaging in open and collaborative discussions about the future of healthcare in the State. They discussed building blocks for effective communication and collaboration. Excerpts as follows...

Insurance: There should be uniform guidelines given by all insurance companies under the General Insurance Council to make health insurance easily accessible and understandable to the common man. Plus, People need to make a personal commitment for their own health payment.

Geriatric care & Home care: Tamil Nadu aims to promote senior care. The stakeholders should learn from global ecosystems. Emerging sectors require more hand holding than established sectors. Facilitating discussion for single solutions to encourage emerging sectors should be done. Senior care and home health care are still not regulated, and needs removal of bottlenecks. There is a need for improvement in financing for senior citizens' care products, particularly copays. A global healthcare provider's consultancy revealed that 90% of care occurs outside the hospital, making these emerging areas for improvement. Private public partnerships and increased awareness of mental health are essential for addressing stigmatisation and access.

Innovation: Open dialogue with the Central Government is needed to leverage open dialogues for innovation, develop new products, and integrate them into routine workflows. Healthcare's growing MedTech and consumable market demands capitalization, affordability, and easy access for off-scale Indian players entering global markets.



Financing: State should help the providers in delivering the same outcome, but at reduced cost and to increase affordability. For that, OPEX should be reduced. Healthcare in India requires technological access to meet financial limitations. Public-private partnerships are crucial to ensure access and avoid wasting 20% of GDP.

Digital health: Changes which are seen in healthcare are triggered by digital revolutions and it will be a catalyst to achieve greater outcomes. India is a super power in technology and healthcare could be the next superpower within.

Costing: A transparent mechanism is needed, with an index linking providers to long-term contracts, ensuring long-term contracts are not entered into India without knowing the future mechanism. State and Central Governments should conduct costing studies on diagnostic scans and procedures to address medical inflation. Consulting companies can suggest viable CGHS prices, but should consult private practitioners and hospitals before proposing pricing. Healthcare faces challenges in working capital, with 40% coming from contracts paying in 60 days and 90% in 90 days. There is no preferential funding, preferential loans, or licensing fees available. Healthcare costs are high, with margins on diagnostics and consumables and room rents. All of this need addressing.

Promote reverse brain drain: Healthcare costs rise by 2% to 3% annually, compared to inflation of 8%. Workforce thus seeks better opportunities in Canada, UK, and Middle East, where they can earn higher. The industry is expecting fantastic healthcare at the lower prices. Increasing private sector growth, and government-led partnerships are crucial for a stable economy.

Data mining: There is lack of benchmarks in the healthcare industry, particularly in terms of pricing. There is a need for studies to help determine the correct pricing. There is a secrecy in data and the potential impact of AI on data sharing. Practitioners must come together to share data for the industry's growth. Viability and sustainability of infrastructure investments are crucial for long-term success, as private equity influences healthcare sector growth. Hospitals can streamline revenue by sharing experiences, data, and partnering with pharmaceutical companies, improving efficiency and cross-selling services.

Building a resilient system: Stakeholders should prioritize public health, wellness, and technology adoption for multi-disease elimination, self-sustainable models, and private provider incentives. Collaborate with private providers and district collectors for climate and disaster resilience.

Environmental, social, and corporate governance (ESG): Healthcare sector is contributing to climate change. It is crucial to proactively address ESG areas and ensure that the Government recognizes the importance of healthcare. An ESG manual promotes responsible healthcare practices, including biodegradable plastics and waste disposal, with a global focus aligned to WHO goals.

Forward-looking Actions

1

Evaluation and feedback collection.

Dissemination of insights through online platforms, social media, and industry publications.

2

3

Follow-up communication to sustain engagement and collaboration.

4

Identification of actionable outcomes.

5

Nurturing collaboration opportunities and continuous engagement.

6

Leveraging conference insights and discussions to engage with policymakers, regulatory bodies, and industry associations to cultivate a favorable environment for digital health innovation.

7

Commencement of future planning in alignment with evolving industry trends for the next conference edition, taking into account feedback and lessons from the current event.

Key areas of collaboration between Tamil Nadu Government & NATHEALTH

01

NCD (Non communicable diseases)

Screening BP, diabetes, Hypertension, breast and cervical cancer. Women volunteers going home to home and referring to nearest PHC (Drive awareness, possible CSR program support).

02

Trauma, accident, and injuries

Empaneled 688 hospitals, nearly 75% private hospitals. First 48 hours hospital charge paid for by government (drive empanelment).

03

Infectious diseases

Communications campaign to talk about infectious diseases (focus on patient safety).

04

Out-of-pocket expenses

Increase empanelment of government social insurance program. Spread awareness. Preauthorization education. Patient education prior to claims.

05

Capacity building for Taluk hospitals

Better infrastructure, better staffing government is trying, Handholding and support through CSR by private hospitals. infrastructure improvement, donation of equipment and CSR engagements.

06

Digitalize Government health records

TN is moving fast towards full ABHA ID registrations. Hospital information system knowledge transfer (possibly digital leadership program).

07

Training

Latest technology led paramedical & nurse training (3D based training, simulation, VR), clinical conferences and more.

08

Reducing MMR/IMR ratio

Enabling the private healthcare system to take care of its patients to reduce MMR/IMR through patient education and awareness.

NATHEALTH Chennai Roadshow: Glimpses



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Participating Organizations

Apollo Hospitals	GHA
Impact Guru Technology Ventures Pvt. Ltd.	Midmark India Pvt. Ltd.
Indus Health Plus	Healthium Medtech Limited
Premji Invest	Poly Medicure Ltd
Ausra Health	Agilus Diagnostics
Dr. Mehta's Hospital	Athulya Senior Care
Eppendorf India Private Limited	Integrated Eldercare Solutions Pvt. Ltd.
General Insurance Council	AiDen Medical Pvt. Ltd.
OPPI	Krsnaa Diagnostics
Medi Assist Insurance TPA Pvt. Ltd.	IPE Global
Kauvery Group of Hospitals	MGM Healthcare
Annai Arul Hospital	Heritage Foundation
Metropolis Healthcare Ltd.	Chettinad Super Speciality Hospital
Philips India Ltd	India Medtronic Pvt. Ltd.
Sheares India Healthcare Management	o3 Capital
Color Cloud Healthcare India Pvt. Ltd.	Villgro Innovations Foundation
Mahajan Imaging & Labs	Akhil systems Pvt. Ltd.
Verventus Healthtech solutions	Hitech Diagnostic center
Gleneagles Global Health City	Kanchi Kamakoti CHILDS Trust Hospital
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