

10th NATHEALTH[®]
Healthcare Federation of India
ANNUAL
AROGYA BHARAT
SUMMIT 2024



21st & 22nd March 2024 | The Lalit, New Delhi

POST EVENT REPORT

Building blocks and role of private sector ecosystem

A cross sectorial thought leadership conclave
for healthcare 2047 roadmap and beyond



Realizing the full potential of the MedTech Industry
in India 2.0



Overcoming roadblocks to increase PPPs in tier 2 cities
and beyond



Forging a Safer Future – India’s Blueprint for patient
safety excellence



Catalysing Digital Health in India



Accelerating Organ Donation and Its effectiveness



Digital Governance system for Ultrasound Devices



9th Annual Summit Report 2023



8th Annual Summit Report 2022



7th Annual Summit Report 2021

Summit Agenda

Day 1: 21st March 2024		
Timings	Session	Session Details
Arrivals & Prelude Activities Hall: Pre-Function Area Crystal Ballroom Time: 10:32 am – 11:30 am (62 minutes)		
9:30 am – 10:00 am (30 minutes)	Registration – Networking Tea/Coffee	
10:00 am – 10:30 am (30 minutes)	Pre-event activities – Sponsor Videos & Audience Poll/Quiz	
10:30 am – 10:32 am (2 Mins)	Lamp Lighting Ceremony	
Opening Plenary Session Hall: Crystal Ballroom 10:32 am – 11:30 am (58 minutes)		
10:32 am – 10:50 am (12 Mins)	Welcome Address and Launch of Theme of the Event by the President, NATHEALTH with NATHEALTH Leadership	Welcome Address: Ms. Ameera Shah Senior Vice President, NATHEALTH and Managing Director, Metropolis Healthcare
10:50 am – 10:58 am (8 Mins)	Special Address	Dr. Harsh Mahajan Past President, NATHEALTH and Founder and Chief Radiologist, Mahajan Imaging
10:58 am – 11:10 am (12 Mins)	MoU Signing	NATHEALTH & EPIHC (Ethical Principles in Health Care) Ethical Principles in Health Care (“EPIHC” or the “Principles”) – Strategic Alliance on Global Ethical Healthcare Standards
11:10 am – 11:15 am (5 minutes)	Closing Remarks	Mr. Shishir Agarwal Secretary, NATHEALTH and Managing Director, Terumo India Private Limited
11:15 am – 11:30 am (15 minutes)	Audience Poll/ Quiz/ Give aways / Refreshments	
Plenary Session: Health Financing Unleashing the private sector enterprise and unlocking Private Capital Hall: Crystal Ballroom 11:30 am - 1:00 pm (90 minutes)		
11:30 am - 11:37 am (7 mins)	Introduction and Opening remarks	Ms. Visalakshi Chandramouli Treasurer, NATHEALTH and Founder Partner Tata Capital Healthcare Fund
11:37 am - 11:40 am (3 minutes)	Setting the context	Dr. Rana Mehta Partner and Leader Healthcare, PwC
11:40 am – 11:48 am (8 minutes)	whitepaper Presentation • Importance of robust PPP framework in India and step towards achieving UHC • How to enable private sector enterprise participation	Mr. Ashish Rampuria Director, PwC India
11:48 am - 12:20 pm (32 minutes)	Panel Discussion 1: Barriers/ challenges in the current hospital PPP ecosystem	Moderator: Dr. Niti Pall Chief Health Officer - AXA Healthanea (Paris)

		<p>Speakers:</p> <p>Dr. Shuchin Bajaj Founder Director, Ujala Cygnus Hospitals</p> <p>Mr. Prashant Sharma Managing Director, Charnock Hospital, SKM Group</p> <p>Mr. Nitish Agrawal Managing Director, Indium Capital Advisors</p> <p>Mr. Shivinder Mohan Singh Past President NATHEALTH</p>
12:20 pm - 1:00 pm (40 minutes)	<p>Panel Discussion 2: Reimaging service delivery in tier II and beyond on sustainable PPP models</p>	<p>Moderator:</p> <p>Mr. Ayanabh Debgupta Co-Founder & Jt. Managing Director, Medica Hospitals Pvt. Ltd.</p> <p>Speakers:</p> <p>Mr. Abhishek Kapoor Chief Executive Officer, Regency Hospitals Pvt. Ltd.</p> <p>Mr. Mohit Khullar Managing Director, O3 Capital</p> <p>Mr. Sunil Thakur Chief of Mission, NATHEALTH Foundation and Partner, Quadria Capital Advisors Pvt. Ltd.</p> <p>Ms. Jagriti Kumar Strategic Account Director- Indian, Philips India Ltd.</p>
<p>Lunch: 01:00 pm – 02:00 pm Hall: Regency 3 and 5 (60 minutes)</p>		
<p>Plenary Session: MedTech 2.0 Realizing the full potential of MedTech Industry in India Hall: Crystal Ballroom (02:00 pm – 04:30 pm) (150 minutes)</p>		
02:00 pm – 02:05 pm (5 minutes)	Context Setting	<p>Mr. Shishir Agarwal Secretary, NATHEALTH and Managing Director, Terumo India Private Limited</p>
02:05 pm – 02:15 pm (2 minutes)	<p>Presentation & Launch of Knowledge paper MedTech 2.0: Realizing the untapped Market Potential and shaping the Global Agenda by Session Chief Guest</p>	<p>Mr. Arunish Chawla Secretary, Department of Pharmaceuticals, Ministry of Chemicals and Fertilizers Government of India (in presence of other esteemed dignitaries present)</p>

<p>02:30 pm – 03:05 pm (35 minutes)</p>	<p>Panel Discussion 1: India poised to growth trajectory: The rising demand for MedTech</p>	<p>Moderator: Ms. Zahabiya Khorakiwala (Virtual) Managing Director, Wockhardt Hospitals Limited</p> <p>Speakers: Dr. Simmardeep S Gill Managing Director and Chief Executive Officer, Sterling Hospitals, Gujarat</p> <p>Mr. Himanshu Baid Managing Director and Co-Founder, Poly Medicure Limited</p> <p>Mr. Arun Seth Director Jubilant Pharmova and Ingrevia; Dixon Technologies</p> <p>Mr. Arjun Dang Chief Executive Officer & Partner, DR. Dang’s Lab</p> <p>Dr. Sumeet Aggarwal Managing Director, Midmark (India) Private Limited</p>
<p>03:05 pm – 03:45 pm (32 minutes)</p>	<p>Panel Discussion 2: Fostering Innovation, Manufacturing and Exports in the MedTech sector</p>	<p>Moderator: Mr. Pavan Choudary Managing Director, Vygon India Private Limited, Chairman-Medical Technology Association of India</p> <p>Speakers: Mr. Chaitanya Sarawate President & Chief Executive Officer-India & South Asia, GE Healthcare; Managing Director, Wipro-GE</p> <p>Ms. Ruma Banerjee Vice President, Neotia Healthcare Initiative Limited</p> <p>Mr. Vikram Vuppala Founder & Chief Executive Officer, NephroPlus</p> <p>Dr. Anurag Agrawal Dean, BioSciences and Health Research, Trivedi School of Biosciences, Ashoka University</p> <p>Mr. Prateek Tiwari Senior Director Neuroscience & Specialty Therapy, Medtronic</p>
<p>03:50 pm – 04:25 pm (35 minutes)</p>	<p>Panel Discussion 3: Regulatory Framework and Make in India Initiatives: Navigating Compliance and Promoting Indigenous Manufacturing</p>	<p>Moderator: Dr. Ashwani Aggarwal Director, Healthcare, Management Consulting, PwC</p> <p>Speakers: Mr. Atantra Dasgupta Senior Director and HOD of Samsung HME Business (India and SAARC)</p>

		<p>Mr. Vishnu Bhatt Chairman and Managing Director, Blueneem</p> <p>Mr. Sudhakar Mairpady Director, Govt Affairs, Regulatory, South Asia, Becton and Dickinson India Private Limited</p>
<p>Plenary Session: Skilling Allied Healthcare Professionals: Unlocking the base of Pyramid Hall: Crystal Ball 04:30 pm – 05:30 pm (60 minutes)</p>		
04:30 pm – 04:37 pm (7 minutes)	Welcome Remarks	<p>Mr. Daljit Singh Past President NATHEALTH</p>
04:37 pm – 04:45 pm (8 minutes)	Keynote Address	<p>Prof. Paul Lalvani Founder and Executive Director, Empower School of Health (New Delhi, Geneva, New York)</p>
04:45 pm – 05:25 pm (40 minutes)	<p>Panel Discussion: Opportunities and ideas ahead for revolutionizing medical education</p>	<p>Moderator: Mr. Rajnish Gupta Partner, Tax & Economic Policy Group, EY</p> <p>Speakers: Dr. Shubnum Singh Principal Advisor, Healthcare Confederation of Indian Industry (CII), Advisor- and Governing board Member Health sector skills council, Governing Board member Life Sciences Sector Skills Council</p> <p>Mr. Ashish Jain Chief Executive Officer, Healthcare Sector Skills Council (HSSC)</p> <p>Mr. Raajiv Singhal Founding Member, Managing Director and Chief Executive Officer, MarengoAsia</p> <p>Prof. Sarang Deo Professor, Operations Management, Indian School of Business</p>
05:25 pm - 05:30 pm (5 minutes)	Q&A Session	
<p>Start-up & Innovation Session Leapfrog: Innovations to Power the Next Wave of Healthcare Hall: Crystal Ballroom 5:30 pm – 7:30 pm (120 minutes)</p>		
5:30 pm – 05:35 pm (5 minutes)	Opening Remarks & Setting the Context	<p>Dr. Shravan Subramanyam Immediate Past President, NATHEALTH and Advisor, Healthcare & Med-tech Investments-Premji Invest</p>
5:35 pm – 6:00 pm (25 minutes)	<p>Fireside Chat: Innovations to Power the Next Wave of Healthcare</p>	<p>Moderator: Mr. Amit Mookim Managing Director, IQVIA South Asia</p>

		<p>Speakers:</p> <p>Dr. Indu Bhushan Former Founding CEO, National Health Authority (NHA) & Ayushman Bharat – Pradhan Mantri Jan Arogya Yojana (AB-PMJAY)</p> <p>Mr. Sujit Jagirdar Chief Innovation Officer, T-Hub</p>
6:00 pm – 6:05 pm (5 minutes)	Setting the Context for Healthtech	<p>Ms. Krithika Sivaraman Senior Vice President, Investment Banking, Indium Capital</p>
6:05 pm – 7:15 pm (70 minutes)	HealthTech Startup Pitch Session: Pitch by 6 Startups	<p>Expert Panel:</p> <p>Dr. Harsh Mahajan Past President, NATHEALTH and Founder and Chief Radiologist, Mahajan Imaging</p> <p>Mr. Daljit Singh Past President, NATHEALTH</p> <p>Dr. Shravan Subramanyan Past President, NATHEALTH and Advisor-Healthcare & Medtech Investments, Premji Invest</p> <p>Mr. Shivinder Mohan Singh Past President, NATHEALTH</p> <p>Mr. Anjan Bose Founding Secretary General, NATHEALTH</p> <p>Mr. Amit Mookim Managing Director, South Asia, IQVIA</p> <p>Mr. Nitish Agarwal Managing Director, Indium Capital Advisors</p> <p>Mr. Parthiv Neotia Executive Director, Neotia Healthcare</p> <p>Mr. P.L. Mehta Vice Chairman & Managing Director, Neotia Healthcare</p> <p>Mr. Mukul Bagga Advisor, Digibridge Healthcare Private Limited</p>
7:15 pm – 7:30 pm (15 minutes)	Industry Expert's Opinion and Felicitations of Startups	
<p>Networking & Fellowship Dinner (Open to all Delegates) Hall: Regency 3 7:30 pm onwards</p>		
End of Day 1		
Day 2: 22nd March, 2024		
<p>Plenary Session: Digital Health Accelerating Healthcare Digitization in India: Conquering the Digital Frontier Hall: Crystal Ball 10:30 am – 12:00 pm (60 minutes)</p>		
10:30 am – 10:45 am (7 minutes each)	Context Setting by Session Co-chairs	<p>Ms. Ameera Shah Senior Vice President, NATHEALTH and Managing Director, Metropolis Healthcare</p> <p>Dr. Om Manchanda Managing Director, Dr. Lal PathLabs Limited</p>

10:45 am – 11:00 am (15 minutes)	Keynote Address	Mr. J. Satyanarayana Chief Advisor, C4IR India, World Economic Forum and Former Chairman, UIDAI
11:00 pm – 11:08 pm (8 minutes)	Launch Of Digital Health Course	Dr. Rizwan Koita Co-founder, Koita Foundation and Co-founder, CitiusTech
11:08 am - 11:15 am (7 minutes)	ADL Presentation whitepaper	Mr. Brajesh Singh President - India, ADL Mr. Vikas Kharbanda Partner, Head, Healthcare and Life Sciences Practice, Middle East, ADL
11:20 am – 12:10 pm (50 minutes)	Panel Discussion: Accelerating Healthcare Digitization in India: Conquering the digital frontier	Moderator: Mr. Hari T Chief Executive Officer, Call Health Speakers: Mr. Amol Naikawadi Joint Managing Director, Indus Health Plus Mr. Anand K Managing Director & Chief Executive Officer, Agilus Diagnostics Mr. Kabir Mahajan Associate Director, Mahajan Imaging Dr. Sameer Gupta Director, Metro Group of Hospitals and Director, Umkal Hospitals Ms. Ratna Devi Chief Executive Officer, Dakshama Health, Director Patient Academy for Innovation and Research, Founder, Indian Alliance of Patient Groups (IAPG), Chair- ISPOR Patient Council, The Professional Society for Health Economics and Outcomes research Ms. Anu Acharya Chief Executive Officer, Map My Genome Mr. Chirag Adatia Chief Executive Officer India & Asia Pacific, THB
12:10 pm – 12:15 pm (5 minutes)	Q&A Session	
Patient Safety: Panel Discussion Hall: Crystal Ball 12:15 pm – 01:15 pm (60 minutes)		
12:15-12:20 pm (5 minutes)	Opening Remarks	Mr. Siddhartha Bhattacharya
12:20 – 12:30 pm (10 minutes)	Keynote Address	Mr. Jaxay Shah Chairperson, Quality Council of India

12:30 – 12:38 pm (08 minutes)	Presentation on Knowledge paper	<p>Mr. Aryaman Tandon Managing Partner and Co-founder, Praxis Global Alliance</p> <p>Ms. Garima Malhotra Partner, Praxis Global Alliance</p>
12:38 – 01:15 pm (35 minutes)	<p>Panel Discussion: Patient Safety Imperative: Charting India’s roadmap for transformative change.</p>	<p>Moderator: Dr. Narottam Puri Advisor (Medical), Fortis Healthcare, Principal Advisor, QCI Advisor— FICCI Health Services and MVT</p> <p>Speakers: Dr. Atul Mohan Kochhar (Session Chair) Chief Executive Officer, NABH National Accreditation Board for Hospitals & Healthcare Providers</p> <p>Dr. J N Srivastava Advisor, Quality Patient Safety Division, NHSRC</p> <p>Dr. Sumana Arora Senior Consultant (Health) NITI Aayog, Government of India</p> <p>Mr. Pranav Sharma Cluster Head (India, Singapore and Malaysia), Baxter India Private Limited</p> <p>Mr. Raju Narayan Global Sector Specialist: Health IFC - International Finance Corporation</p>
<p>LUNCH: 01:15 pm – 02:15 pm Hall: Regency 3 and 5 (60 minutes)</p>		
<p>Fireside Chat: Health, Climate & Sustainability Hall: Crystal Ball 2:15 pm - 2:45 pm (30 minutes)</p>		
02:15 pm – 02:45 pm	Fireside Chat	<p>Moderator: Mr. Himanshu Sikka Chief Strategy and Diversification Officer, IPE Global</p> <p>Speakers: Mr. Sanjiv Navangul Managing Director & Chief Executive Officer, Bharat Serum & Vaccines Limited</p> <p>Dr. Neeta Rao Senior Health Lead, USAID</p> <p>Dr. K Madan Gopal Advisor, NHSRC</p>

		<p>Ms. Shivani Sahai Head, Impact & ESG, Quadria Capital</p> <p>Mr. Piyush Jain Co-founder & CEO, Carepal Group and Impact Group</p>
TEA BREAK: 02:45-03:00 (Audience Poll/ Q/A/ Quiz/ Give aways)		
NATHEALTH Impact Awards 2024 3:00 pm – 3:45 pm (45 minutes)		
3:00 pm – 3:10 pm (5 mins each)	Opening Remarks	Mr. Ashwajit Singh Chair North Region - NATHEALTH and Founder & Managing Director, IPE Global
03:10 pm – 03:20 pm (10 minutes)	<p>Jury Members</p> <p>PATIENT SAFETY</p> <p>Dr. Narottam Puri Advisor (Medical) Fortis Healthcare, Principal Advisor, QCI, Advisor- FICCI Health Services and MVT</p> <p>Dr. Pawan Kapoor Vice Chairman, Rus Education Vice Chancellor Lincoln American University</p> <p>Dr. Manjunath Shankar Head Strategic Initiatives & Lead Technical Team, PAHAL - Innovative Financing Platform (Supported by USAID)</p> <p>CSR/ PSUs/ CORPORATES/ FOUNDATION</p> <p>Ms. Roli Singh Additional Secretary, MoHFW</p> <p>Dr. Shravan Subramanyam Past President, NATHEALTH and Advisor- Advisor, Healthcare & Med-tech Investments-Premji Invest</p> <p>Mr. Ashwajit Singh Chair North Region - NATHEALTH and Founder & Managing Director, IPE Global</p> <p>Mr. Devendra Khandait Deputy Director, Bill & Melinda Gates Foundation</p> <p>HEALTH & INNOVATION</p> <p>Dr. Shirshendu Mukherjee Mission Director, PMU (DBT-BIRAC-BMGF-Wellcome Trust)</p> <p>Dr. Ranjan Kumar Choudhury Advisor, Healthcare Technology, NHSRC</p> <p>Dr. Harsh Mahajan Past President, NATHEALTH and Founder and Chief Radiologist, Mahajan Imaging</p> <p>Dr. Neeta Rao Senior Health Lead, USAID</p> <p>HEALTH & CLIMATE</p> <p>Dr. Dinesh Arora Principal Health Specialist, ADB</p>	

	<p>Mr. Himanshu Sikka Project Director, PAHAL; Chief Strategy & Diversification Officer, IPE Global Limited</p> <p>Dr. K Madan Gopal Advisor, NHSRC</p>
03:20 pm – 03:40 pm (20 minutes)	Announcement of NATHEALTH Impact Awards 2024 by Honorable Jury Members
Concluding Session: Bringing in the Summit Deliberations & Charting an Action Plan for Arogya Bharat 3:40 pm - 04:15 pm	
03:40 pm – 04:15 pm	<p>Session Moderators:</p> <p>Mr. Ashish Yadav Partner, Kearney</p> <p>Ms. Barathi Srinivasan Partner, Kearney</p> <p>Speakers:</p> <p>Mr. Sanjeev Vashishta Managing Director, PathKind Diagnostics (P) Ltd.</p> <p>Ms. Nanki Lakhwinder Singh Managing Director, ProTribe Services India Pvt Ltd</p> <p>Mr. Suyash Borar Director, Xceptional Health & Wellness Pvt. Ltd.</p> <p>Mr. Vivek Srivastava Founder & Chief Executive Officer, HCAH India</p> <p>Mr. Vivek Kwatra Product Head, Healthcare and Education Finance, HDFC Bank</p> <p>Dr. Rajeev Sharma Vice President. TATA 1mg</p> <p>Dr. Bhupendra Kumar Rana, Founding CEO, Quality & Accreditation Institute (QAI)</p> <p>Mr. Dharmil Sheth Co-founder & Whole time Director, API Holdings Limited</p>
4:15 pm – 04:30 pm (15 minutes)	VOTE OF THANKS
End of Arogya Bharat Summit	

Table of Contents

14 President's Note
16 Tree Plantation Drive

16 Summit Feedback Survey Results
17 Executive Summary

Inaugural Session

28 Leaders Speak: Ms. Ameera Shah
29 Leaders Speak: Dr. Harsh Mahajan

30 Leaders Speak: Mr. Shishir Aggarwal
31 MoU signing of NATHEALTH & EPIHC

Plenary Session: Unleashing Private Sector Enterprise and Unlocking Private Capital

33 Introduction: Ms. Visalakshi Chandramouli
34 Leaders Speak: Dr. Rana Mehta
35 Whitepaper Presentation
37 Panel Discussion 1: Barriers/challenges in the current hospital PPP ecosystem

41 Panel Discussion 2: Reimaging service delivery in tier II and beyond on sustainable PPP models
44 Key Takeaways

Plenary Session: Realizing the full potential of MedTech Industry in India

46 Introduction: Mr. Shishir Aggarwal
48 Leaders Speak - Mr. Arunish Chawla
50 Panel Discussion 1: India poised to growth trajectory: The rising demand for MedTech
53 Panel Discussion 2: Fostering Innovation, Manufacturing and Exports in the MedTech sector

57 Panel Discussion 3: Regulatory Framework and Make in India Initiatives: Navigating Compliance and Promoting Indigenous Manufacturing
61 Key Takeaways

Plenary Session: Skilling Allied Healthcare Professionals: Unlocking the base of Pyramid

63 Introduction - Mr. Daljit Singh
64 Leaders Speak - Prof. Paul Lalvani
65 Panel Discussion: Opportunities and ideas ahead for revolutionizing medical education

69 Key Takeaways

Plenary Session: Leapfrog: Innovations to Power the Next Wave of Healthcare

71 Introduction: Dr. Shravan Subramanyam
73 Fireside Chat: Innovations to Power the Next Wave of Healthcare

76 Introduction: Krithika Sivaraman
77 HealthTech Startup Pitch Session
81 Key Takeaways

Plenary Session: Accelerating Healthcare Digitization in India: Conquering the Digital Frontier

83 Introduction: Ms. Ameera Shah
85 Introduction: Dr. Om Manchanda
87 Leaders Speak: Mr. J. Satyanarayana
89 Launch of Digital Health Course: Digital Health Masterclass (DHMC)

91 Whitepaper Presentation
94 Panel Discussion: Accelerating Healthcare Digitization in India: Conquering the Digital Frontier
99 Key Takeaways

Panel Discussion: Patient Safety

101 Introduction: Dr. Narottam Puri
103 Leaders Speak : Mr. Jaxay Shah
104 Whitepaper Presentation

106 Panel Discussion: Patient Safety Imperative: Charting India's roadmap for transformative change.
111 Key Takeaways

Fireside Chat: Health, Climate & Sustainability

112 Fireside Chat: Health, Climate & Sustainability

118 Key Takeaways

NATHEALTH Impact Awards 2024

120 Introduction: Mr. Ashwajit Singh
121 Jury Members

122 NATHEALTH Impact Awards: A Glimpse

124 Concluding Session: Bringing in the Summit Deliberations & Charting an Action Plan for Arogya Bharat

127 Vote of Thanks
128 Picture Gallery

President's Note

Dr. Ashutosh Raghuvanshi

President, NATHEALTH

Managing Director & CEO, Fortis Healthcare



Greetings,

It gives me great pleasure to share our 10th Annual Summit Report 2024.

The theme of this year's summit, "India's journey towards health for all and the crucial role of the private sector," could not have been more timely or relevant. Over the past decade, NATHEALTH has been at the forefront of advocating for the pivotal role of the private sector in shaping India's healthcare landscape. This summit provided an invaluable platform to review our progress, address existing challenges, and chart a course for the future.

The summit's overarching vision of understanding how "good health equals good economy, good human development" resonates deeply with our mission at NATHEALTH. We recognize that achieving universal health coverage (UHC) is not only a moral imperative but also a catalyst for economic growth and social development. By converging the efforts of the public, private, and civil sectors, we can ensure that every individual has access to quality healthcare services, regardless of their socio-economic status.

Throughout the summit, discussions were organized around key thematic areas, including health financing, digital health, MedTech, healthcare innovations, CSR, patient safety, and digital health leadership. Each of these areas represents critical components of our healthcare system and requires collaborative action to drive meaningful change.

In the realm of health financing, we explored roadblocks towards scaling public-private partnerships (PPPs) and identified strategies to catalyze private participation and increase risk appetite. Recognizing the transformative potential of digital health, we discussed critical pathways to scale Aadhaar-based digital mission (ABDM) across the NATHEALTH adoption index, ensuring seamless integration and interoperability of healthcare data.

The importance of allied health and creating a skilled technical workforce for healthcare at the base of the pyramid was also emphasized. By investing in education and training programs, we can address the shortage of healthcare professionals and improve access to quality care in underserved communities.

Similarly, in the field of MedTech, we discussed creating a strong pull-demand side forces that will harness MedTech as a force multiplier in healthcare delivery. Innovations in healthcare were

highlighted as key drivers of the next wave of transformation, with a focus on recognizing trends that will accelerate this shift towards patient-centric care.

Corporate Social Responsibility (CSR) in healthcare was another area of focus, with the NATHEALTH Impact Awards 2024 recognizing industry programs that drive collaboration in emerging areas like environment and sustainability. By promoting responsible business practices and social accountability, we can amplify the positive impact of the private sector on society and the environment.

Despite the achievements and progress discussed during the summit, we also acknowledged the challenges that lie ahead. Regulatory clarity, enablement for private enterprises, and addressing critical gaps and barriers in healthcare delivery were identified as priority areas for action. By fostering greater engagement and dialogue at multiple levels, we can drive superior value from India's healthcare system and ensure patient safety remains at the forefront of our efforts.

I am delighted to report overwhelming positive feedback from attendees at the summit. 83% rated the event as excellent in relevance, emphasizing its significance in addressing key healthcare issues. Additionally, 91% praised the speakers for their quality, reflecting the caliber of expertise shared. Moreover, 74% expressed a high likelihood of recommending the event, highlighting its interactive and engaging nature. Further, 66% showed interest in becoming NATHEALTH members, underscoring the growing recognition of NATHEALTH's role in driving positive change in the healthcare sector. We look forward to leveraging this momentum for future endeavors.

Looking ahead, NATHEALTH remains committed to driving progress in the healthcare sector and working towards our shared vision of a healthier, more prosperous India. As we continue our journey towards health for all, I urge each of you to remain actively engaged and committed to the cause. Together, we can build a healthcare system that is resilient, inclusive, and equitable, ensuring that no one is left behind.

Thank you once again to all those who contributed to the success of the 10th NATHEALTH Annual Arogya Bharat Summit. Your dedication and commitment to advancing healthcare in India are truly commendable, and I look forward to our continued collaboration in the years to come.

Tree Plantation Drive: A NATHEALTH Initiative

During the 10th NATHEALTH Annual Arogya Bharat Summit 2024, NATHEALTH conducted a tree plantation drive, emphasizing its commitment to environmental sustainability. As part of this initiative, NATHEALTH arranged for a grove of 50 trees to be planted at Trees for Ecotourism, Tsomgo, Sikkim, India. This symbolic gesture highlights NATHEALTH's dedication to addressing climate issues and contributing to India's health for all agenda through sustainable practices.



OPENING PLENARY SESSION

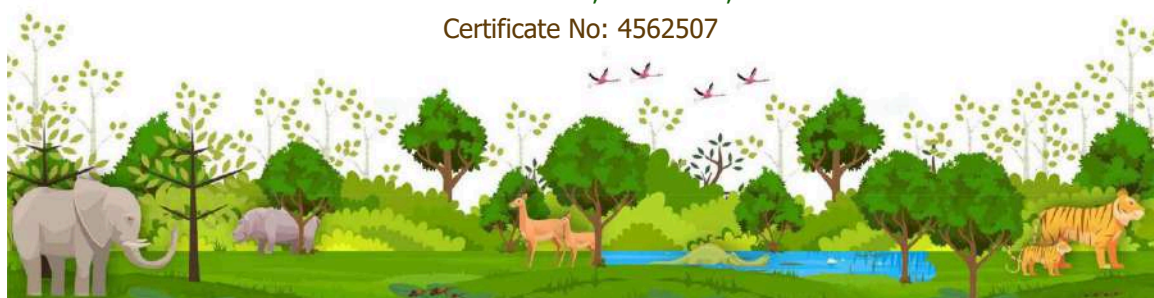
Honoured With A Grove Of 50 Trees at Trees for Ecotourism, Tsomgo, Sikkim, India
By NATHEALTH

10th NATHEALTH Annual Arogya Bharat Summit 2024

India's Move Towards Health For All Agenda Building Blocks and Role of Private Sector Ecosystem

21 – 22 March 2024, New Delhi, India

Certificate No: 4562507



10th NATHEALTH Annual Summit Survey Results

Questions Asked	Excellent	Good	Satisfactory	Below Expectations
1. How relevant was the event for you?	83%	13%	4%	0%
2. How practical were the issues?	Highly- 74%		26%	0%
3. How interactive was the event?	35%	43%	22%	0%
4. What was the quality of speakers?	91%	9%	0%	0%
5. How likely do you rate your inclination to recommend this event?	74%	17%	9%	
6. What are the chances of you becoming a NATHEALTH member, in case you are not one already?	Highly- 66%, Undecided 10%, No 24%			

* 7% of the delegates filled survey, results are directional and not accurate to statistical scrutiny of randomisation

** Over 140 new member leads were generated- those who requested for further follow up

Executive Summary

The 10th NATHEALTH Arogya Bharat Summit 2024, held on 21st and 22nd March, addressed the critical imperative of health, human capital development, and economic growth in India. With the theme “India's journey towards health for all & the crucial role of private sector,” the summit provided a platform to explore how India can transition towards a comprehensive healthcare framework that embraces accessibility, value-based healthcare, and quality for all while removing equity barriers. Moreover, it delved into the role of private healthcare players in achieving Universal Health Coverage (UHC) in India.

Good health equals good economy, good human development

India stands at a pivotal juncture, grappling with a healthcare landscape marked by significant challenges and opportunities. Non-communicable diseases (NCDs) account for nearly 66% of all mortalities in the country, while maternal and infant mortality rates underscore the urgent need for a robust healthcare system. Despite hosting approximately 20% of the global disease burden, India's healthcare infrastructure remains inadequate, with statistics revealing a shortfall in doctors and hospital beds compared to global benchmarks.

The Global Burden of Disease Report 2017 ranked India at 154 out of 195 countries in terms of healthcare accessibility. Less than 15% of the population receives some form of health expenditure support from government or privately funded insurance schemes, and millions plunge into poverty annually due to catastrophic health expenditures. This highlights the pressing need for a comprehensive and inclusive healthcare strategy, requiring steadfast political commitment and commensurate investments.

India is positioned as a destination for medical value travel, offering high-quality healthcare at around 1/10th of US costs. However, the disparities in healthcare accessibility within the country remain stark, necessitating a comprehensive and collaborative approach to address multifaceted challenges.

The nation's economic and innovation landscape is intricately linked to healthcare development. Over the past years, India has emerged as a beacon of innovation, reflecting its prowess in fostering a culture of creativity and technological advancement. The healthcare sector has also become a magnet for foreign direct investment (FDI), reflecting its pivotal role in economic development. Investments in healthcare not only bolster the industry but also stimulate job creation and technological advancements, propelling India's economic narrative forward.

The Road to Universal Health Coverage (UHC) & the Role of Private Healthcare Stakeholders

A healthy population is essential for both societal well-being and economic advancement. The road to Universal Health Coverage (UHC) depends on bringing together the complementary strengths of the government and the private sector through public-private partnerships (PPP). There is a need for convergence in financing, care provisioning, and governance to drive better solutions and last-mile care delivery.

Executive Summary

With less than 15% of the vulnerable population having health insurance pooling, the role of private healthcare players becomes pivotal but challenging in expanding coverage. The private sector's expertise, innovation, and resources can complement the government's efforts to establish a robust healthcare system that caters to the diverse needs of the population.

The Government of India's Ayushman Bharat Pradhan Mantri Jan Arogya Yojana (PMJAY) plays a crucial role in aligning public and private efforts towards UHC. By providing financial protection to millions and covering secondary and tertiary hospitalization expenses, PMJAY creates opportunities for private healthcare players to contribute actively to the mission of UHC.

Enabling the private enterprises

The private sector's integral role in Indian healthcare is evident, with the majority of service delivery supported by private business models. Investments in healthcare delivery, medical devices, and diagnostics drive healthcare accessibility, employment generation, technological innovation, and overall economic development.

Supporting the private sector involves providing conducive environments for them to scale up the healthcare system. This includes ensuring regulatory clarity, revolutionizing medical education, and leveraging digital technologies to streamline healthcare delivery.

The Arogya Bharat Summit 2024 aimed to catalyze effective collaboration on the UHC agenda, envisioning a healthcare ecosystem where both the public and private sectors fulfill their responsibilities while meeting key obligations to stakeholders. This collaboration involves not only addressing the challenges but also innovating to scale hyper-efficient models of care delivery.

The summit emphasized the need for a clear and effective regulatory architecture tied to a long-term vision. It highlighted the importance of building quality technical capacity to enforce regulations, ensuring that they promote both innovation and accountability.

Private medical education holds the key to fostering a healthcare workforce equipped to address the evolving needs of the population. There is a need to revolutionize medical education and enable private enterprise in strategic areas where private participation aligns with the government's policy priorities.

Digital technologies are another facet poised to play a transformative role in leapfrogging healthcare. From integrating public and private sectors to connecting urban and rural areas, patients to care, and physical to remote services, the effective use of technology can streamline healthcare delivery.

The Arogya Bharat Summit 2024 aimed to catalyze effective collaboration on the UHC agenda, envisioning a healthcare ecosystem where both the public and private sectors fulfill their responsibilities while meeting key obligations to stakeholders. This collaboration involves not only addressing the challenges but also innovating to scale hyper-efficient models of care delivery.

Executive Summary

To overcome the roadblocks, stakeholders and organizations need to...

- Emphasize the importance of collaboration between public and private sectors to achieve Universal Health Coverage (UHC) in India.
- Encourage investments in healthcare infrastructure and innovation to address evolving healthcare needs.
- Ensure regulatory clarity and effective governance to support the growth of the private healthcare sector.
- Focus on improving accessibility and affordability of healthcare services for all segments of the population.
- Leverage digital technologies to streamline healthcare delivery and bridge urban-rural healthcare divide.
- Strengthen medical education and training to build a skilled healthcare workforce capable of meeting the nation's healthcare demands.
- Align policies and initiatives with long-term goals to ensure sustainable growth and development of the healthcare sector.
- Continuously monitor and evaluate progress, adapting strategies as needed to address emerging challenges and opportunities.

The objective of NATHEALTH 10th Annual Arogya Bharat Summit 2024

The objective of the summit was to bring together industry leaders, policymakers, principal secretaries, and MoS-Health to discuss, deliberate, and chart the way forward for a stronger India in terms of healthcare. The summit aimed to:

- Discuss learnings from the pandemic and strategize for future healthcare challenges.
- Explore and adapt global best practices from all stakeholders in the healthcare ecosystem, including start-ups and philanthropic organizations.
- Create new operating mechanisms to enhance the efficiency and accessibility of healthcare services.
- Harness knowledge and technology for the best possible healthcare solutions.
- Highlight the crucial role of the private sector in augmenting India's healthcare infrastructure and services.
- Foster public-private partnerships to bridge critical gaps in healthcare delivery, especially in underserved regions.
- Emphasize the importance of investing in innovation and technology in healthcare for the overall growth and well-being of the nation.

Summit Sessions

The event brought together industry stakeholders on a single platform and enabled pertinent discussions for the future of Indian healthcare. Following the sessions, attendees participated in interactive quizzes and fun activities, maintaining the interest and momentum, and an engaging and productive summit experience.

Executive Summary

Plenary session

The special address honored the vision of NATHEALTH's Founder President and recognized the leadership's efforts in fostering collaboration across the healthcare industry. NATHEALTH's achievements in establishing credibility and its commitment to sustainability and growth within the healthcare sector were underscored.

In a significant move towards ethical healthcare practices, NATHEALTH signed a memorandum of understanding (MoU) with Ethical Principles in Health Care (EPiHC). The exchange ceremony marked a pivotal alliance in the healthcare sector, emphasizing the initiative's aim to create an ecosystem for ethical discussions and engagement among stakeholders.

Plenary Session: Unleashing Private Sector Enterprise and Unlocking Private Capital

The session addressed challenges in Indian healthcare, focusing on inadequate infrastructure and inequitable coverage. Collaborative engagement with stakeholders is emphasized, aiming to explore public-private partnership models. The importance of health financing in achieving universal health coverage is highlighted, emphasizing the need to unleash private capital and unlock private sector enterprise. NATHEALTH's focus on health financing was underscored, with discussions on leveraging PPPs and introducing self-contributory insurance products. Critical enablers needed to attract investment, including extending the VGF scheme and ensuring revenue visibility, were emphasized.

whitepaper Presentation

- Importance of robust PPP framework in India and step towards achieving UHC
- How to enable private sector enterprise participation

The presentation focused on the challenges and solutions for optimizing PPPs in healthcare. Insights from stakeholders and a survey highlighted challenges in demand, operational expenses, and capital expenditure.

Panel Discussion 1 - Barriers/challenges in the current hospital PPP ecosystem: The discussion explored challenges in PPP uptake, including insufficient reimbursement rates and funding unpredictability. The mindset and societal expectations surrounding PPPs were discussed, emphasizing the need for tailored approaches and government support.

Panel Discussion 2 - Reimagining service delivery in tier II and beyond on sustainable PPP models: The panel discussed the critical role of PPPs in addressing healthcare accessibility and affordability challenges, with perspectives from diverse sectors. Challenges include uncertainty regarding utilizations and access, while opportunities lie in strategic partnerships and innovative financing mechanisms.

Executive Summary

Plenary Session: Realizing the full potential of MedTech Industry in India

The panel discussion explored the regulatory framework and Make in India initiatives, focusing on shaping MedTech's future, compliance navigation, and indigenous manufacturing promotion.

Key points discussed:

- The importance of stable, predictable regulations was emphasized, urging India's participation in international forums for harmonization. MedTech's role in healthcare as an enabler for improved outcomes and patient safety was underscored.
- The significance of robust regulatory capacities for software-driven devices was highlighted, stressing thorough verification and collaboration to address emerging challenges.
- Recommendations included incentivizing investors, implementing a single-window approval system, and reducing bureaucratic hurdles to enhance ease of doing business.
- Advocacy for increased R&D focus and government support to enable small organizations to undertake innovative projects was presented.
- The panel emphasized AI, machine learning, and data analytics integration, stressing the need for accuracy and effectiveness in clinical settings.
- Maintenance and service importance for medical equipment to ensure patient safety was discussed, advocating for standardized procedures akin to the automobile industry.
- Adapting regulatory frameworks to technological advancements was highlighted, calling for collaboration to ensure compliance and safety.
- Efforts to promote innovation and adoption within the healthcare system were discussed, emphasizing collaboration between industry, government, and healthcare providers.
- The importance of defining quality standards for medical devices and enhancing technology transfer was emphasized, stressing robust testing and validation processes.

In conclusion, a robust regulatory framework and supportive policies are imperative for propelling indigenous manufacturing and innovation in the Indian MedTech sector. Incorporating best global practices, incentivizing R&D, and streamlining regulatory processes are essential for sustainable growth and improved healthcare outcomes.

Plenary Session: Allied Healthcare Professionals: Unlocking the Base of the Pyramid

The session emphasized the importance of allied healthcare professionals in various healthcare settings and the need for investment and ownership in this sector.

Key points discussed:

- The critical role of allied healthcare professionals was discussed, highlighting their significance in diagnostics, home care, and hospitals.
- The session addressed persistent challenges such as inadequate healthcare professionals in India compared to other countries, and the structural classification of allied health professionals.

Executive Summary

- Opportunities presented by aging populations and technological innovations were acknowledged, alongside challenges due to the shortage of allied health professionals.
- A vision for creating an industry-driven ecosystem for allied health professionals was presented, with delineation of key stakeholder roles.
- Initiatives like the "H capsule" focusing on health capacity building and ongoing collaborations with various stakeholders were discussed

Panel Discussion: Opportunities and Ideas for Revolutionizing Medical Education

The panel discussed the evolving role of allied health workers, demographic trends, economic opportunities, and challenges in allied health education.

- The importance of allied health workers, demographic trends, and economic opportunities were highlighted.
- Challenges such as the lack of societal recognition and career pathways were discussed.
- The panel emphasized the importance of skilling, training, and industry collaboration to enhance employability.
- Successful models of healthcare training and delivery were shared, emphasizing innovation and addressing workforce challenges.

The session concluded with a call to action for collaborative efforts to promote the recognition and integration of allied health professionals into the healthcare workforce, emphasizing training, collaboration, and innovation in medical education.

Start-up & Innovation Session: Leapfrog - Innovations to Power the Next Wave of Healthcare

The session highlighted the increasing prominence of startups within the healthcare ecosystem, emphasizing their potential to revolutionize healthcare. From peripheral spaces to the plenary session, startups now take center stage, reflecting India's evolving engagement with technology. Discussions centered on the integration of AI into healthcare, with recognition of its transformative role in traditional healthcare models. Despite challenges such as low per capita expenditure on medical technology, the sector shows promise due to an aging population and increasing healthcare spending. The session concluded with anticipation for forthcoming discussions and networking opportunities.

Fireside Chat: Innovations to Power the Next Wave of Healthcare

The chat discussed post-pandemic shifts and the pivotal role of startups in reshaping healthcare delivery. Platforms like T-Hub were highlighted for their role in incubating and accelerating startups. Multidimensional innovation in healthcare, particularly in large-scale programs like PMJAY, showcased the transformative potential of IT solutions. The chat also emphasized the importance of comprehensive support mechanisms for startups, addressing regulatory hurdles and financial constraints. Creating conducive ecosystems requires collaboration and strategic investments, with platforms like T-Hub facilitating interactions and investment opportunities.

Executive Summary

The session discussed the surge in technology-driven innovations within the healthcare and medical technology sectors, fueled by venture capital interest and government initiatives. Key success drivers, including access to hospitals, healthcare providers, and patient capital, were identified, setting the stage for the curated pitch session.

HealthTech Startup Pitch Session

The pitch highlighted startups' innovative solutions in areas like MRI robotics, genomics, AI in radiology, and MedTech advancements. Startups presented their achievements, market expansions, and commitments to innovation, showcasing the transformative potential of technology in healthcare delivery.

Plenary Session: Digital Health: Accelerating Healthcare Digitization in India

The plenary session emphasized the urgent need to embrace digital technologies to revolutionize healthcare delivery in India. This session focused the urgent need to embrace digital technologies for revolutionizing healthcare delivery in India. Digital health solutions were highlighted as central drivers of transformation, offering opportunities for increased access to healthcare services and innovation. Key topics discussed were:

Digital Health Solutions: How digitalization can drive growth and profitability for the private sector while enhancing access to healthcare services.

Challenges and Imperatives for Change: Challenges such as data management guidelines, investment requirements, and data security were discussed. Collaborative efforts between public and private sectors, policymakers, and technology providers were emphasized to address these challenges.

Data Security and Compliance: The critical concern of data security was highlighted, necessitating regulatory clarity and increased awareness. Strategies for ensuring compliance with data protection policies, such as the Digital Personal Data Protection Act, were discussed.

Creating Pull for Adoption: Efforts to drive adoption were discussed, focusing on creating demand among consumers through government mandates, provider incentives, and payer requirements, including the ABHA ID for certain healthcare interactions.

The Vision for Digital Health in India: The government's visionary initiatives, including the ABHA ID, were highlighted as laying the groundwork for a digital future in healthcare. However, compliance standards and quality benchmarks were deemed essential for successful digitalization.

The session underscored the transformative potential of digital health in India and emphasized the importance of collective efforts in realizing this vision.

Executive Summary

Patient safety: Panel discussion

The discussion emphasized the need to acknowledge and address inherent risks in healthcare settings. Reference was made to the landmark report "To Err is Human," highlighting the shift from blame culture to accountability and prevention.

Advancing Patient Safety: A Collective Effort

The collaborative efforts of NATHEALTH, Praxis Global, and NABH in advancing patient safety were highlighted. The role of QCI and NABH in establishing benchmarks and promoting continuous improvement within the healthcare ecosystem was emphasized.

Insights from a knowledge paper were presented, recognizing patient safety as a cornerstone in healthcare. The paper outlined dimensions of patient safety, addressed challenges, and offered policy recommendations, emphasizing technology, data, collaboration, and leadership.

India's progress in healthcare indicators and government initiatives, including the National Patient Safety Implementation Framework, were discussed. The magnitude of patient safety issues, interventions like Laksh and Muscon, and the importance of effective implementation were emphasized.

The role of the pharmaceutical and medical technology sectors in enhancing patient safety, training, awareness, innovation, technology, and the importance of accreditation standards and digital health initiatives by NABH were discussed.

The universal need for patient safety, financial implications, overcoming constraints, collaboration for collective responsibility, and key takeaways were highlighted, emphasizing integration into healthcare financing and investment, fostering a culture of safety, and working together globally.

Fireside Chat: Health, Climate & Sustainability

The Fireside Chat discussed the multifaceted challenges posed by climate change to public health. Rising temperatures, extreme weather events, and environmental pollution impact air and water quality, exacerbating health risks such as vector-borne diseases and respiratory illnesses. Government initiatives, including the National Action Plan for Climate Change and the National Health Mission, focus on building resilience and adapting healthcare systems to climate change. These efforts aim to address climate-induced diseases and promote climate-resilient infrastructure.

Industry Response and Sustainability: The healthcare industry is increasingly adopting sustainable practices to minimize its environmental footprint and address emerging health threats. Investments in solar power, recycling, and research and development (R&D) contribute to mitigating environmental impacts and improving healthcare outcomes. Investors and philanthropic organizations recognize the importance of integrating climate considerations into healthcare policies and practices. Funds prioritize investments that promote climate resilience, while

Executive Summary

initiatives mobilize resources for community-level solutions and climate-resilient healthcare infrastructure.

Healthcare Financing and Long-Term Strategies: Climate-related health challenges contribute to increased disease incidence, placing a financial burden on individuals and healthcare systems. Long-term strategies are essential to address environmental impacts on health and ensure affordability and accessibility of healthcare services. The industry's innovation and research efforts also focus on emerging challenges, such as declining fertility rates. Safer hormone treatments and initiatives promoting women's health and sports aim to address preventive aspects and societal challenges.

Role of Philanthropy and Private Sector: Philanthropy plays a crucial role in incentivizing private sector involvement aligned with government priorities. Collaboration between stakeholders is essential to mobilize resources for impactful solutions. Innovative financing models are explored to drive investments in climate-friendly solutions and healthcare infrastructure. A community-centric approach is emphasized, empowering communities and ensuring community-driven initiatives for success. Stakeholder collaboration and collective responsibility are highlighted to address challenges effectively and foster resilient healthcare systems.

NATHEALTH Impact Awards 2024

Before delving into the NATHEALTH Impact Awards, NATHEALTH introduced a new initiative - the NATHEALTH Foundation. This platform aimed to facilitate impactful CSR initiatives in healthcare, ensuring quality, accessible, and affordable healthcare for all, including climate-related initiatives.

This year's awards expanded to include health innovation, health and climate, and traditional corporate social responsibility, besides patient safety. A distinguished jury, comprising experts from different fields, evaluated submissions based on innovation, impact, equity, inclusiveness, sustainability, scalability, and replicability.

Award Categories and Selection Process: The rigorous evaluation involved three stages: application submission, shortlisting and criteria agreement, and interactive presentations. A total of 74 applications were received, demonstrating the breadth of impactful work. Shortlisted applicants presented their initiatives, fostering detailed discussions, ensuring awards were given based on merit and impact.

Evaluation Process: The jury, representing diverse expertise, played a crucial role in evaluating submissions. Their dedication ensured that awards were given based on merit and impact, reflecting NATHEALTH's commitment to driving meaningful change.

The NATHEALTH Impact Awards and the establishment of the NATHEALTH Foundation signify a commitment to fostering positive change in healthcare and related sectors. Through collaboration, innovation, and rigorous evaluation, NATHEALTH aims to drive meaningful impact and improve healthcare accessibility and quality for all.

Executive Summary

Concluding Session: Bringing in the Summit Deliberations & Charting an Action Plan for Arogya Bharat

The concluding session summarized insights from diverse speakers and discussions.

- The summit covered various aspects of healthcare, including investments, public-private partnerships, and advancements in medical devices and technology. The aim was to identify actionable items for the industry.
- Discussions emphasized increasing private investments in healthcare infrastructure, particularly in Tier 2, Tier 3, and rural areas, with support from the public sector.
- The role of medical devices and technology in healthcare, along with regulatory challenges and innovations, was highlighted, showcasing India's advancements.
- The importance of allied healthcare professionals in providing quality care was discussed, focusing on training and support beyond infrastructure.
- Digital solutions' availability and interoperability were addressed, stressing the need for integrated platforms and data sharing for effective healthcare delivery.
- Discussions covered patient safety, common guidelines, and healthcare's contribution to sustainability, underlining the need for quality care amidst broader societal and environmental challenges.
- The urgency of comprehensive geriatric care and out-of-hospital solutions to relieve pressure on healthcare infrastructure was highlighted, emphasizing short-term rehabilitation and awareness campaigns.
- Technological innovations enhancing interoperability and data sharing were identified as critical for advancing healthcare delivery, requiring stakeholder collaboration and government support.

The summit provided valuable insights into challenges and opportunities in healthcare, focusing on geriatric care, out-of-hospital solutions, and technological advancements. The concluding thoughts centered around the fact that stakeholders must collaborate and innovate to ensure quality care, patient safety, and sustainable healthcare practices.

Inaugural Session

A congregation of industry leaders' addresses & whitepaper releases to commence the Summit



Leaders Speak

Advancing Healthcare: The Private Sector's Role in India



Ms. Ameera Shah

*Senior Vice President, NATHEALTH
Managing Director, Metropolis Healthcare*

While commemorating the milestone of the 10th NATHEALTH Annual Arogya Bharat Summit, it is imperative to reflect on the journey thus far and to chart a course for the future. The summit not only serves as a platform for dialogue and collaboration but also signifies a decade of relentless commitment to advancing healthcare in India.

Role of the Private Sector: Regarding the role of the private sector, the theme "India's journey towards health for all and the crucial role of the private sector" is emphasized. The pivotal contribution of private healthcare players in reshaping India's healthcare landscape is underscored, stressing the collective effort required to redefine healthcare accessibility and quality.

Commitment to Universal Health Coverage: A commitment to realizing universal health coverage is symbolized by the summit, aiming not only to celebrate achievements but also to promote innovation, policy reforms, and actionable solutions. Leveraging the historic moment to propel India towards a future where health equity and access are fundamental rights is urged.

Collaborative Strategy: The summit is highlighted as a vital platform for fostering collaboration to overcome challenges hindering healthcare accessibility nationwide. Emphasizing the importance of engaging the private sector and advocating for a collaborative strategy to ensure comprehensive and inclusive healthcare solutions are made.

Catalyzing Action: Aiming to catalyze action and transform rhetoric into reality, the summit aims to ensure that quality healthcare becomes a universal right for every citizen. The event is portrayed as a center of innovation, where stakeholders come together to ideate, innovate, and inspire change.

Expectations from the Summit: Expectations from the summit include a focus on regulatory clarity, enablement for private enterprises, and addressing critical gaps and barriers in healthcare. Key areas of discussion include health financing, digital health, MedTech, healthcare innovations, CSR, patient safety, and digital health leadership.

Leaders Speak

Shaping the Future of Healthcare: NATHEALTH's Journey and Vision



Dr. Harsh Mahajan

*Past President, NATHEALTH and Founder
Chief Radiologist, Mahajan Imaging*

The session commenced with the honoring of Dr. Pratap Reddy, the Founder and President of NATHEALTH, recognized for his vision and contributions to the private healthcare sector in India since the 1980s. Dr. Reddy's vision for NATHEALTH to emulate the role of NASSCOM in the IT industry was highlighted, with acknowledgment of the organization's growth and impact, particularly during the pandemic.

NATHEALTH's achievements in establishing credibility as a consultative body for government policies and initiatives related to healthcare have been fundamental. The organization's credibility is underscored by its consultations with various government ministries and bodies, as well as its contributions to policy formulation and decision-making processes.

Collaboration and Dialogue: NATHEALTH's collaborative efforts with other industry organizations, including AHPI, CII, FICCI, and chambers of commerce, are highlighted. The importance of dialogue and partnership in addressing challenges faced by the healthcare industry, such as pricing regulations and universal health coverage, was emphasized.

Commitment to Sustainability and Growth: NATHEALTH is committed to sustainability and growth within the healthcare sector, emphasizing the importance of viability and access to quality healthcare services. Skilling, health education, and the involvement of medical colleges are identified as key components of achieving this vision.

Acknowledgment of Leadership: Recognition was given to Dr. Anjan Bose and Siddhartha Bhattacharya for their roles in shaping NATHEALTH's trajectory and fostering collaboration across various sectors of the healthcare industry. Their leadership was credited for bringing together diverse stakeholders, including hospitals, diagnostic service providers, MedTech companies, home health, telehealth, telemedicine, and health insurance providers.

Leaders Speak

Navigating Healthcare: Insights from the 10th NATHEALTH Summit



Mr. Shishir Aggarwal

*Secretary, NATHEALTH
Managing Director, Terumo India Private Limited*

The 10th NATHEALTH Arogya Bharat Summit served as an event filled with immersive knowledge sharing, contribution, and engagement. Acknowledging the significant commitment of time from all participants and panel members, the session urged everyone to actively engage in panel discussions by posing critical questions, ensuring a sense of purpose and contribution. NATHEALTH's foundational purpose of uniting healthcare stakeholders to advocate for healthcare accessibility for all, echoing the summit's theme, was highlighted.

Encouraging attendees to contribute to strengthening whitepapers and publications, Mr. Aggarwal emphasized the collective effort's potential impact. He concluded by urging attendees to immerse themselves in the summit sessions, pledging wholehearted support over the next two days.

Following his remarks, Mr. Aggarwal announced a token of appreciation for attendees, revealing plans to plant 50 trees in collaboration with NGO partner Grow Trees. The certificates provided serve as a testament to NATHEALTH's commitment to sustainability.

He thanked the summit sponsors, including platinum sponsors Apollo, Fortis, O3, and Terumo, as well as gold sponsors Siemens Healthineers and Wipro GE.

Concluding the session, the secretary handed over the proceedings to facilitate interactive quizzes and fun activities to maintain the day's momentum, ensuring an engaging and productive summit experience for all participants.

NATHEALTH & EPIHC sign MoU on Global Ethical Healthcare Standards



In a significant move towards ethical healthcare practices, NATHEALTH has voluntarily adopted the Ethical Principles in Health Care (EPIHC) developed by the World Bank and the International Finance Corporation (IFC). The memorandum of understanding (MoU) exchange ceremony between NATHEALTH and EPIHC marks a pivotal alliance in the healthcare sector.

The event witnessed esteemed representatives from NATHEALTH and EPIHC coming together for the MoU exchange. Notable figures included Dr. Harsh Mahajan, Ms. Amira Shah, Mr. Shashi Raghuram, Ms. Visa Lakshmi Chandramouli, and Mr. Siddhartha Bhattacharya from NATHEALTH, alongside Mr. Ramesh Ramanathan, Mr. Raju Narayan, and Mr. Amit Chandra from the IFC team.

EPIHC, comprising ten principles guiding ethical behavior in healthcare, emphasizes societal contribution, high-quality standards, and environmental respect. Representatives encouraged attendees to explore EPIHC's principles and consider voluntary adoption.

Mr. Ramesh Ramanathan from the IFC highlighted the initiative's aim to create an ecosystem facilitating stakeholder discussions and engagement, ultimately enhancing the healthcare sector's ethical framework. He welcomed others to join the initiative, emphasizing its voluntary nature and potential significance for the sector.

Mr. Raju Narayan reiterated the importance of ethical healthcare practices, emphasizing EPIHC's role in promoting ethical principles among healthcare providers and investors. He welcomed NATHEALTH's participation and encouraged others to join the movement.

The ceremony concluded with gratitude towards the IFC team for their collaboration and an invitation to attendees to explore EPIHC's principles further at designated stalls.

Plenary Session

Unleashing Private Sector Enterprise
and Unlocking Private Capital

Knowledge Partner
Plenary Session



Introduction

Transforming Indian Healthcare through PPPs and Health Financing



Ms. Visalakshi Chandramouli

Treasurer, NATHEALTH and Founder Partner, Tata Capital Healthcare Fund

Indian healthcare is currently facing many challenges that mainly include inadequate infrastructure, inequitable coverage, and limited focus on outcomes. Through collaborative engagement with stakeholders, including hospital providers, institutional investors, and development agencies, the summit aims to explore public-private partnership models for transforming healthcare in India.

Importance of Health Financing: The importance of health financing in achieving universal health coverage is underscored. Emphasis was placed on the need to unleash private capital and unlock private sector enterprise to address the country's healthcare challenges. Highlighting India's attraction of over \$40 billion in private capital over the last decade and a half, the significance of healthcare as a top recipient of private investment is emphasized.

NATHEALTH's Focus on Health Financing: The focus shifts to NATHEALTH's efforts on health financing, which began with discussions on leveraging PPPs to create more hospital beds and serve the missing middle. The introduction of a self-contributory insurance product is highlighted as a call to action. Building on last year's discussions, this year's focus shifts to a renewed emphasis on hospital PPPs, with plans for further reports and frameworks.

Critical Enablers for Investment: From an investor's perspective, emphasis is placed on critical enablers needed to attract investment, including extending the VGF scheme, ensuring revenue visibility, and facilitating timely reimbursement. Anticipation is expressed for the presentations by knowledge partners and panel discussions with industry experts, acknowledging the NATHEALTH Secretariat team's efforts and thanking PwC for their support.

Setting the context

Reflections on Public-Private Partnerships in Healthcare



Dr. Rana Mehta

Partner and Leader Healthcare, PwC

There is a need to reflect on past encounters regarding public-private partnerships in healthcare. The challenges inherent in transitioning from infrastructure projects like highways to healthcare facilities are highlighted. The significant disparity between initial capital expenditure (CAPEX) and ongoing operational expenditure (OPEX) in healthcare is emphasized, underlining the long-term financial burden hospitals face.

Successes and Challenges of Public-Private Partnerships: While acknowledging hurdles, successes in certain sectors, such as single specialty clinics and dialysis centers, are noted. Focusing on these areas is suggested to provide valuable insights for future initiatives.

Government's Role and Challenges: The government's transition from a service provider to the largest healthcare payer was discussed. Historical shortcomings in delivering healthcare services are cited, with a trend where individuals shift to the private sector for healthcare and education as they enter the middle class. The urgent need to address this issue and leverage the private sector's operational efficiencies to enhance public sector hospitals was emphasized.

Seizing the Opportunity for Change: The current window of opportunity presented by impending changes in government and the forthcoming 100-day plan was highlighted. The timeliness of addressing healthcare challenges, particularly in the context of the government's vision for a developed India ("Viksit Bharat"), was stressed. Collaboration between the public and private sectors is deemed crucial to fulfill the healthcare needs of India's population.

Whitepaper Presentation: Unlocking the Potential of Public-Private Partnerships (PPPs) in Healthcare



Mr. Ashish Rampuria
Director, PwC India

The discussion began with an acknowledgment of the longstanding issue of public-private partnerships (PPPs) in healthcare. Despite discussions dating back to 2004, significant progress has not been achieved. To address these challenges, the importance of gathering insights from stakeholders and conducting surveys to understand the current landscape of PPPs in India is highlighted. Active participation in the survey was encouraged to provide valuable input for government organizations.

Challenges Faced by PPPs: PPPs in healthcare face numerous challenges, including issues related to demand, operational expenses, and capital expenditure. Demand tends to concentrate in metro and tier-one cities, posing viability challenges for providers in tier-three and four cities. Operational costs in these regions often exceed those in urban areas, making it difficult to match revenue with expenses. Moreover, delays in payments further exacerbate the financial strain on providers.

Key Action Areas and Recommendations: The whitepaper presents six key action areas to address these challenges. These include strategies to optimize revenue, manage operational costs, and streamline infrastructure creation. Recommendations focus on revenue optimization through narrow networking, optimal location selection, and revenue visibility guarantees. Operational viability can be enhanced through viability gap funding (VGF) and payment assurance mechanisms.

Innovative Approaches: To optimize working capital, innovative solutions such as transitioning from a trust model to an insurance model were proposed. Separating infrastructure creation from hospital operations was suggested to attract specialized providers and ensure an asset-light model. Examples from other sectors within India and globally are cited to illustrate potential approaches.

Enabling Government Support: Government support is crucial in streamlining approvals, standardizing contracts, and revising scheme rates to align with market realities. Initiatives such as creating single-window infrastructure and contract standardization can expedite the PPP process. Moreover, revisions in government scheme rates can ensure the sustainability of PPP projects.

Potential Impact: Successful PPPs have the potential to address India's healthcare challenges and generate significant employment opportunities. Calculations suggest that even a modest increase in PPP projects could lead to the establishment of hundreds of hospitals and tens of thousands of beds, benefiting millions of patients annually.

In conclusion, optimizing the PPP equation is essential to attracting investors, ensuring timely treatment for patients, and garnering government support for further investments. By addressing revenue visibility, managing costs, and optimizing working capital, PPPs can become a success in the Indian healthcare landscape. This virtuous cycle of investment, patient care, and government support can pave the way for transformative change in healthcare delivery.

Plenary Session: Health Financing - Unleashing the private sector enterprise and unlocking Private Capital

Panel Discussion 1: Barriers/challenges in the current hospital PPP ecosystem

Moderator: Dr. Niti Pall, Chief Health Officer - AXA Healthanea (Paris)

Experts:

- Dr. Shuchin Bajaj, Founder Director, Ujala Cygnus Hospitals
- Mr. Prashant Sharma, Managing Director, Charnock Hospital, SKM Group
- Mr. Nitish Agrawal, Managing Director, Indium Capital Advisors
- Mr. Shivinder Mohan Singh, Past President NATHEALTH



Experts during the panel discussion

Barriers/challenges in the current hospital PPP ecosystem



Mr. Prashant Sharma
MD, Charnock Hospital, SKM Group



Dr. Shuchin Bajaj
Founder Director, Ujala Cygnus Hospitals

PPP Uptake Challenges

During the discussion, the challenges surrounding the slow uptake of hospital PPPs were explored. Factors such as insufficient reimbursement rates, funding unpredictability, and demographic constraints impacting patient influx were highlighted. Economic hurdles, particularly the discrepancy between operational expenses and capital expenditure, were emphasized as significant barriers to PPP adoption in healthcare.

Mindset and Societal Expectations

A prevailing mindset viewed PPPs primarily as a social obligation rather than a viable business opportunity for private entities. Government expectations for private investments without corresponding returns were discussed, reflecting broader societal perceptions of healthcare as a communal responsibility rather than a profitable venture for investors.

Comparative Analysis

Panelists juxtaposed healthcare PPPs with initiatives in other sectors, emphasizing the unique complexities and uncertainties inherent in healthcare operations. Caution was advised against benchmarking healthcare against industries with different dynamics, advocating instead for tailored approaches to address sector-specific challenges effectively.

Case Studies and Real-World Experiences

Insights from professionals' experiences shed light on the challenges encountered in establishing hospitals in underserved regions and participating in PPP initiatives, particularly amid the COVID-19 pandemic. Bureaucratic delays, funding uncertainties, and logistical hurdles emerged as prominent challenges discussed during the session.

Future Prospects and Recommendations

Despite the obstacles, the conversation remained optimistic about the potential of PPPs to mitigate healthcare disparities, especially in rural and underserved areas. Recommendations included revisiting government policies, improving funding mechanisms, and embracing innovative PPP models tailored to address healthcare sector exigencies.



Mr. Nitish Agrawal
MD, Indium Capital Advisors



Mr. Shivinder Mohan Singh
Past President, NATHEALTH

Rural Healthcare Challenges and Opportunities

The panel delved into the unique challenges and opportunities in delivering quality healthcare in remote areas such as Angkul and Jharsuguda. Despite their small-town designation, these regions had population sizes comparable to major cities in countries like the UK. The imperative of providing quality healthcare, particularly during critical moments like the golden hour, underscored the need to effectively address geographical disparities in healthcare access.

PPP Bidding Criteria and Financing Models

Discussions shifted to the intricacies of PPP bidding criteria and financing frameworks. Concerns were raised about the prevailing L1 pricing basis, with panelists advocating a shift towards a quality-based point system (QCPS) to attract and retain high-caliber players in the healthcare sector. Challenges related to project timelines, decision-making uncertainties, and financing intricacies in PPP projects were elucidated.

Financial Viability and Expectation Discrepancies

The discourse delved into the financial viability of healthcare PPPs, with panelists highlighting the mismatch between provider expectations and government funding. Concerns were raised regarding the perception of private healthcare as costly, stemming from unrealistic comparisons with charitable or government-run hospitals. Emphasis was placed on recalibrating the basis of comparison to accurately reflect the actual costs and value of private healthcare services.

Social Contracts and Talent Pipeline

Panelists addressed the concept of social contracts in healthcare provision, emphasizing the importance of aligning community expectations with service delivery models. The challenge of reverse migration and the demand for top-notch facilities and medical talent in smaller towns were discussed. Innovative approaches to talent recruitment and retention, such as incentivizing local physicians and investing in skill development, were proposed as potential solutions.

Role of Philanthropy and Blended Financing

The role of philanthropy in bolstering PPP projects and addressing funding gaps was deliberated. Panelists suggested integrating philanthropic partnerships alongside public and private collaborations to enhance the financial sustainability of healthcare initiatives.

Blended financing models, leveraging capital from development banks and private investors, were posited as potential solutions to bridge funding shortfalls in PPP projects.

The session concluded with reflections on the challenges and opportunities in healthcare PPPs, urging collaborative efforts to overcome financial, operational, and regulatory barriers. Audience participation enriched the dialogue with insights and inquiries concerning financing, provider expectations, and government policies, spotlighting the multifaceted dynamics shaping the future of healthcare delivery in India.

Plenary Session: Health Financing - Unleashing the private sector enterprise and unlocking Private Capital

Panel Discussion 2: Reimaging service delivery in tier II and beyond on sustainable PPP models

Moderator: Mr. Ayanabh Debgupta, Co-Founder & Jt. Managing Director, Medica Hospitals Pvt. Ltd.

Experts:

- Mr. Abhishek Kapoor, Chief Executive Officer, Regency Hospitals Pvt. Ltd.
- Mr. Mohit Khullar, Managing Director, O3 Capital
- Mr. Sunil Thakur, Chief of Mission, NATHEALTH Foundation and Partner, Quadria Capital Advisors Pvt. Ltd.
- Ms. Jagriti Kumar, Strategic Account Director- Indian, Philips India Ltd



Experts during the panel discussion

Reimaging service delivery in tier II and beyond on sustainable PPP models



Mr. Mohit Khullar
MD, O3 Capital



Mr. Abhishek Kapoor
CEO, Regency Hospitals Pvt. Ltd.

The discussion opened with a focus on the critical role of PPPs in addressing healthcare accessibility and affordability challenges. The panelists represented diverse sectors within the healthcare industry, including providers, investors, banking, and medical equipment manufacturers.

Perspectives on PPPs

There is a need to increase the viability of operating large hospitals in tier-two cities in the context of the changing dynamics of healthcare delivery and the importance of district-level healthcare provision.

Role of Medical Equipment Partners

The crucial role of medical equipment partners in PPPs, successful collaborations aimed at reducing healthcare costs, improving access, and enhancing investor returns. There is a need for long-term commitments and structured partnerships as key to sustainability.

Investor Confidence and Market Dynamics

Experts in banking and healthcare highlighted strong investor interest in expanding healthcare services to tier two and tier three cities. Addressing operational viability gap funding is identified as essential to attract investors and ensure the success of PPP ventures.

Challenges and Opportunities

The panel addressed various challenges faced by PPP initiatives, including uncertainty regarding utilization, access, and return on capital. Clear rules and commitments from both the public and private sectors were advocated to mitigate risks and foster investor confidence.

Navigating Expectations and Challenges

The discussion highlighted the core dilemma of PPPs: determining the primary goal they aim to address. Uncertainty arises regarding whether PPPs should prioritize increasing utilization, enhancing access to healthcare, or guaranteeing a sizable patient base. The case of the successful PPP hospital partnership in Mohali serves as an illustrative



Mr. Sunil Thakur

*Chief of Mission, NATHEALTH Foundation and
Partner, Quadria Capital Advisors Pvt. Ltd.*



Ms. Jagriti Kumar

*Strategic Account Director- Indian
Philips India Ltd.*

example, showcasing the nuanced nature of PPP success and the need for objective clarity.

Government's Role and Financial Support

The conversation underscored the pivotal role of governments in PPP initiatives, particularly in ensuring the right balance between utilization and access. The provision of financial support, particularly for operational expenses (OPEX), emerges as a critical factor in sustaining PPP ventures. The lack of OPEX viability gap funding was identified as a significant hurdle, necessitating a shift towards a more comprehensive approach to funding.

Learning from International Models

The panel drew insights from international models, such as the Valencia model in Spain, demonstrating the potential for PPPs to deliver cost-effective and quality healthcare over the long term. The success of such models hinges on strategic partnerships, transparent governance frameworks, and innovative financing mechanisms that incentivize public and private sector participation.

Addressing Operational Challenges

The discussion emphasized the importance of addressing operational challenges healthcare facilities face, particularly in their initial years of operation. Examples from Orissa highlighted the effectiveness of operational viability gap funding in mitigating financial risks and ensuring the sustainability of PPP projects. Adopting risk-sharing mechanisms and transparent monitoring frameworks further enhances the viability of PPPs.

Future Prospects

There is a need for political will, commercial viability, and collaboration between stakeholders to drive the success of PPPs in healthcare. Despite the inherent complexities, there is optimism regarding the evolving landscape of PPPs in India, with opportunities for accelerating progress through collective learning, policy reforms, and coordinated efforts among industry players. The panel concluded with a call for unified action to realize the full potential of PPPs in transforming healthcare delivery across the nation.

Key Takeaways

- Improve reimbursement rates and funding predictability to incentivize private investment in PPPs.
- Enhance clarity and consistency in bidding criteria, shifting towards quality-based evaluation systems.
- Address operational expenses versus capital expenditure gaps through innovative financing mechanisms.
- Foster a shift in societal mindset, portraying PPPs as viable business opportunities for private entities.
- Implement transparent governance frameworks to mitigate bureaucratic delays and uncertainties.
- Develop tailored approaches to address sector-specific challenges effectively, avoiding comparisons with other industries.
- Facilitate skill development and talent retention through innovative recruitment strategies and incentives.
- Strengthen government support, providing financial assistance for operational expenses to ensure sustainability.
- Encourage strategic partnerships and long-term commitments to enhance PPP viability and success.
- Foster collaborative efforts among stakeholders to drive policy reforms and coordinated action for healthcare PPP expansion.

Plenary Session

Realizing the full potential of
MedTech Industry in India

Knowledge Partner
Plenary Session



Introduction

Unveiling MedTech 2.0: Addressing Challenges and Recommendations for the Healthcare Industry



Mr. Shishir Agarwal

Secretary, NATHEALTH, and Managing Director, Terumo India Private Limited

NATHEALTH team has dedicated considerable effort to producing the knowledge paper on MedTech 2.0. Over the past few years, the healthcare industry has witnessed substantial changes, positioning itself at the threshold of growth and transformation. Amidst these changes, several critical questions have emerged, shaping the discourse within the industry.

Key Themes Addressed

1. Enhancing Adoption: A fundamental challenge lies in increasing the adoption of medical technology. India's healthcare landscape lacks standardized care pathways, resulting in varying practices among healthcare providers. Establishing standard clinical protocols is imperative to drive adoption effectively.

2. Reducing Dependency on Imports: Despite progress, India still relies significantly on imported medical devices, accounting for approximately 60% of the market. Encouraging domestic manufacturing and technology upgradation are essential strategies to reduce import dependency and bolster self-reliance.

3. Embracing Digitalization: The convergence of hardware and software underscores the importance of digital adoption in medical technology. While hardware innovations have slowed, digital advancements offer new avenues for enhancing healthcare delivery. Integrating digital solutions into existing technology frameworks is critical for driving innovation and efficiency.

4. Balancing Safety, Quality, and Affordability: Ensuring patient safety and quality of care while maintaining affordability poses a complex challenge. Striking the right balance between these factors requires collaborative efforts from industry stakeholders and policymakers.

5. Regulatory Facilitation: An enabling regulatory framework is vital to support the

growth and innovation of the medical technology sector. Regulatory reforms should focus on fostering innovation, streamlining processes, and ensuring compliance with international standards.

The knowledge paper outlines five priority areas for collective action:

- 1. Enhancing Adoption:** Facilitate easy financing options, expand insurance coverage for medical technology, and standardize care pathways to promote widespread adoption.
- 2. Promoting Make in India:** Incentivize research and development (R&D) spending, standardize harmonization efforts, and expand government schemes to support domestic manufacturing.
- 3. Advancing Digital Health:** Foster collaboration between regulatory bodies and innovators to ensure alignment between technological advancements and regulatory frameworks. Expand insurance coverage for digital health services to promote accessibility.
- 4. Ensuring Patient Safety:** Strengthen training and scaling programs for healthcare professionals, reinforce preventive maintenance practices, and prioritize the development of a robust post-market surveillance system.
- 5. Regulatory Reforms:** Emphasize value-based procurement, integrate health technology assessment processes, and rationalize the Goods and Services Tax (GST) to support the growth of the medical technology sector.

The launch of the knowledge paper marks a pivotal moment in advancing the discourse on MedTech 2.0. As we stand at the brink of a paradigm shift in the healthcare industry, collaboration and innovation are paramount. By aligning our efforts and leveraging collective expertise, we can realize the vision of a healthier and more resilient healthcare ecosystem.

Keynote Address

Presentation & Launch of Knowledge Paper MedTech 2.0



Mr. Arunish Chawla

*Secretary, Department of Pharmaceuticals, Ministry of Chemicals and Fertilizers
Government of India*

In the realm of equilibrium economics, the interplay of demand and supply is fundamental. The 10th NATHEALTH Annual Arogya Bharat Summit is witnessing the convergence of these forces; there is no healthcare without MedTech, and conversely, no MedTech without healthcare.

MedTech: The Industry of the Future: MedTech embodies the future of India's industrial landscape. The fusion of healthcare and MedTech heralds a new era of service delivery, poised to redefine our nation's healthcare narrative. As we pay homage to the pioneers who sculpted India's pharmaceutical prowess, we must also pivot our focus towards the burgeoning realm of MedTech and its symbiotic relationship with healthcare.

Initiatives and Progress: The journey towards realizing this vision has already commenced. The Production Linked Incentive (PLI) scheme for MedTech is a testament to our commitment and has yielded remarkable success. Recent endeavors have witnessed the inception of greenfield projects, showcasing India's capability to manufacture world-class medical devices domestically, a feat previously reliant on imports. Additionally, the establishment of a streamlined regulatory framework, exemplified by the single-window system in the regulator CDSO and the MedTech Mitra initiative, underscores our concerted efforts toward fostering a conducive ecosystem for innovation and growth.

The Imperative of Collaboration: Introducing India Medistack: However, the path ahead is replete with challenges. MedTech encapsulates a myriad of disciplines, each contributing to its multifaceted nature. Recognizing this complexity, I am pleased to announce the inception of India Medistack, an initiative aimed at charting the value chains and ecosystems of the entire MedTech industry. India Medistack will serve as a platform for stakeholders to collectively explore and map

the intricacies of MedTech, encompassing imaging devices, critical care equipment, diagnostics, and more. Through this immersive endeavor, we seek to delineate the contours of our industry, identify gaps, and devise comprehensive strategies to propel its growth.

Embracing Collaboration and Innovation: The Secretary, Department of Pharmaceuticals, Ministry of Chemicals and Fertilizers Government of India extend a cordial invitation to PricewaterhouseCoopers and all interested stakeholders to partake in an open-house discussion, wherein we shall amalgamate insights and perspectives to inform future policy-making endeavors.



Launch of Knowledge paper MedTech 2.0: Realizing the untapped Market Potential and shaping the Global Agenda

Plenary Session: MedTech 2.0 - Realizing the full potential of MedTech Industry in India

Panel Discussion 1: India poised to growth trajectory: The rising demand for MedTech

Moderator: Ms. Zahabiya Khorakiwala (Virtual), Managing Director, Wockhardt Hospitals Limited

Experts:

- Dr. Simmardeep S Gill, Managing Director, and Chief Executive Officer, Sterling Hospitals, Gujarat
- Mr. Himanshu Baid, Managing Director and Co-Founder, Poly Medicure Limited
- Mr. Arun Seth, Director Jubilant Pharmova and Ingrevia; Dixon Technologies
- Dr. Arjun Dang, Chief Executive Officer & Partner, DR. Dang 's Lab
- Mr. Sumeet Aggarwal, Managing Director, Midmark (India) Private Limited



Experts during the panel discussion

India poised to growth trajectory: The rising demand for MedTech



Dr. Simmardeep S Gill
MD and CEO, Sterling Hospitals, Gujarat



Mr. Himanshu Baid
MD and Co-Founder, Poly Medicure Ltd.

The discussion delved into various facets of India's MedTech landscape, from regulatory advancements and industry challenges to technological innovations and patient-centric care. It covered a wide range of topics related to healthcare, technology, and innovation. Here's a summary of the key points discussed:

The Growth Trajectory of MedTech in India

India's MedTech sector is experiencing a significant growth trajectory, with current valuations at \$12 billion and projections soaring to \$50 billion by 2030. This growth is fueled by collaborative efforts across stakeholders, including healthcare providers, digital infrastructure developers, government policymakers, financial institutions, and investors.

Challenges and Opportunities for India's MedTech Sector

The discussion highlighted regulatory advancements, exemplified by the impending full regulation of the industry by October 2023 and the sector's resilience during the COVID-19 pandemic. Initiatives like the Production Linked Incentive (PLI) schemes and specialized zones like AMTZ signify an environment ripe for innovation and manufacturing. While progress has been made, there is a need for fundamental changes to drive sustainable growth, including increased investments in R&D and innovation.

Enhancing Patient Experience through Technology

Leveraging technology to enhance patient experiences emerged as a critical theme. Hospitals can streamline operations and improve service delivery by mapping patient journeys and optimizing touchpoints. Technology plays a crucial role in streamlining processes and optimizing patient care, ultimately enhancing the overall patient experience within healthcare facilities.

Personalizing Healthcare through Diagnostics

The importance of personalized diagnostics in healthcare was underscored. Leveraging AI-powered tools like bespoke lab test package curators enables tailored diagnostic solutions, minimizing redundancy and optimizing outcomes. This customized approach ensures that healthcare packages are appropriate to individual health goals, lifestyle, medical history, and other health insights.



Mr. Arun Seth
*Director Jubilant Pharmova and Ingrevia;
Dixon Technologies*



Dr. Arjun Dang
CEO & Partner, DR. Dang's Lab



Mr. Sumeet Aggarwal
MD, Midmark (India) Private Ltd.

Integration of Engineering and Medical Colleges

Initiatives to bridge the gap between engineering and medical education were discussed. Setting up hospitals in collaboration with engineering institutes aims to foster bio-innovations and advance medical technology. This integration facilitates cross-domain collaboration and drives innovation in healthcare.

Export Opportunities

While there has been significant growth in the export of healthcare products and services, there's still room for further expansion. Focusing on meeting global standards and quality can help Indian healthcare companies tap into international markets more effectively. Collaboration among stakeholders, including industry players, government bodies, and educational institutions, is crucial for driving innovation and achieving growth targets in the healthcare sector.

Overall, the discussion emphasized the importance of leveraging technology, fostering innovation, and collaboration to address the evolving needs of the healthcare industry and improve healthcare outcomes. India's MedTech sector holds immense potential to drive innovation, accessibility, and affordability in healthcare delivery, ultimately improving the well-being of its citizens.

Plenary Session: MedTech 2.0 - Realizing the full potential of MedTech Industry in India

Panel Discussion 2: Fostering Innovation, Manufacturing and Exports in the MedTech sector

Moderator: Mr. Pavan Choudary, Managing Director, Vygon India Private Limited, Chairman-Medical Technology Association of India

Experts:

- Mr. Chaitanya Sarawate, President & Chief Executive Officer-India & South Asia, GE Healthcare; Managing Director, Wipro-GE
- Ms. Ruma Banerjee, Vice President, Neotia Healthcare Initiative Limited
- Mr. Vikram Vuppala, Founder & Chief Executive Officer, NephroPlus
- Dr. Anurag Agrawal, Dean, BioSciences and Health Research, Trivedi School of Biosciences, Ashoka University
- Mr. Prateek Tiwari, Senior Director Neuroscience & Specialty Therapy, Medtronic



Experts during the panel discussion

Fostering Innovation, Manufacturing and Exports in the MedTech sector



Mr. Chaitanya Sarawate
President & CEO-India & South Asia, GE
Healthcare; MD, Wipro-GE



Ms. Ruma Banerjee
Vice President, Neotia Healthcare Initiative Ltd.

Fostering Innovation in the MedTech Sector

The discussion opened with a focus on fostering innovation in the MedTech sector. The panelists highlighted the need for more indigenous innovation tailored to the specific needs of Indian patients and healthcare providers. While access to global technologies exists, there's a gap in addressing unique challenges within the Indian ecosystem, such as the reprocessing of dialyzers in the dialysis space. The conversation emphasized the role of medical practitioners as instrumental in finding solutions to these challenges, calling for increased collaboration between healthcare providers and innovators.

Innovative Solutions in Healthcare Delivery

The conversation shifted to the role of technology in improving healthcare delivery, particularly within hospital settings. Panelists highlighted the importance of technology in streamlining routine functions, reducing workload for healthcare workers, and enhancing the overall patient experience. The focus extended beyond hospital walls to include home care, emphasizing the potential for technology to facilitate healing in familiar environments. The discussion underscored the need for insurance support and regulatory frameworks to enable the shift towards home-based healthcare solutions.

Localization and Industry Challenges

The panel addressed challenges related to localization and import dependency in the MedTech industry. With 90% of MedTech products being imported, there's a pressing need to create a level playing field for domestic manufacturers. This includes addressing issues such as customs duties, strengthening regulatory processes, and fostering public-private partnerships. The conversation highlighted the importance of incentivizing local innovation and production to reduce import dependency and enhance self-sufficiency in meeting healthcare needs.

Innovation and Product Development

The discussion concluded with insights into innovation and product development within organizations like Medtronic. Examples cited included advancements in robotic spine and cranial surgery, transcatheter aortic valve implantation (TAVI), continuous glucose monitoring (CGM), and navigation technologies. While significant progress has been made



Mr. Vikram Vuppala
Founder & CEO, NephroPlus



Dr. Anurag Agrawal
Dean, BioSciences and Health Research, Trivedi School of Biosciences, Ashoka University

in product innovation, there's a growing emphasis on expanding into healthcare services. This transition reflects a broader industry trend towards holistic solutions that combine innovative products with value-added services to meet evolving healthcare needs.

Promoting Indian Startups and Collaboration

The discussion started with a focus on promoting Indian startups and collaboration efforts. One of the examples highlighted is the partnership with Cure AI, particularly in stroke management. The implementation of a stroke management AI tool was discussed, which operates on a hub and spoke model, aiming to improve patient outcomes by facilitating immediate attention and transfer to specialized treatment centers.

Investment in Infrastructure and Skill Building

The conversation shifted to the significant investments made by the government in developing healthcare infrastructure, including aims at skill-building initiatives. Collaboration with institutions aims for training facilities and skill development in various medical specialties is emphasized.

Addressing Market Size and Local Needs

The importance of understanding local needs and tailoring product development accordingly was underscored. For instance, GE Healthcare's approach to designing products based on clinicians' requirements in India was highlighted, leading to market expansion and export potential.

Challenges in Manufacturing

Challenges in fostering manufacturing in India were discussed, particularly in terms of building the necessary ecosystem and addressing technical constraints. The discussion included insights into reducing import dependence by enhancing local manufacturing capabilities through innovation and market-driven approaches.

Role of Quality and Reputation in Exports

Quality standards and reputation management have emerged as crucial factors in the export of medical technology products. The panel stressed the importance of maintaining high-quality standards to build trust and credibility in global markets, emphasizing the long-term implications of reputation management.



Mr. Prateek Tiwari
*Senior Director Neuroscience & Specialty
Therapy, Medtronic*

Government Initiatives and Policy Framework

The role of government initiatives and policy frameworks, such as those implemented through platforms like GEM (Government eMarketplace), in promoting quality standards, facilitating procurement, and ensuring adherence to regulatory requirements was highlighted. The emphasis is on creating a conducive environment for the growth of the medtech industry.

Conclusion and Future Outlook

The panel discussion provided valuable insights into the challenges and opportunities in fostering innovation, manufacturing, and exports within India's MedTech sector. From the imperative of localized innovation to the role of technology in healthcare delivery and the need for supportive regulatory frameworks, the conversation underscored the multifaceted approach required to drive sustainable growth and meet the evolving healthcare needs of the Indian population. The discussion concluded with reflections on the immense potential of the Indian medtech industry, emphasizing the importance of continued collaboration between stakeholders to address challenges such as affordability, quality, and market access. While expressing optimism about the industry's growth trajectory, the panel also acknowledged the need for strategic planning, innovation, and sustained efforts to fully realize this potential.

Plenary Session: MedTech 2.0 - Realizing the full potential of the MedTech Industry in India

Panel Discussion 3: Regulatory Framework and Make in India Initiatives: Navigating Compliance and Promoting Indigenous Manufacturing

Moderator: Dr. Ashwani Aggarwal, Director, Healthcare, Management Consulting, PwC

Experts:

- Mr. Atantra Dasgupta, Senior Director and HOD of Samsung HME Business (India and SAARC)
- Mr. Guruprasad S, Vice President and Global Director, Bosch Global Software Technologies
- Ms. Shobha Mishra Ghosh, Director & Head, Govt. Affairs & Policy, India & South Asia, GE HealthCare
- Mr. Vishnu Bhatt, Chairman and Managing Director, Blueneem
- Mr. Sudhakar Mairpady, Director, Govt Affairs, Regulatory, South Asia, Becton and Dickinson India Private Limited



Experts during the panel discussion

Regulatory Framework and Make in India Initiatives: Navigating Compliance and Promoting Indigenous Manufacturing



Mr. Atantra Dasgupta
*Director Jubilant Pharmova and Ingrevia;
Dixon Technologies*



Mr. Guruprasad S
*Vice President and Global Director,
Bosch Global Software Technologies*

The panel discussion delved into the regulatory framework and Make in India initiatives, focusing on shaping the future of MedTech, navigating compliance, and promoting indigenous manufacturing. The discussion highlighted key areas such as AI integration, patient safety, and post-market surveillance.

Best Global Practices in Regulatory Framework

Reflections on the importance of predictability and stability in regulatory frameworks were shared, emphasizing the need for rigorous implementation to inspire investor confidence. Drawing from lessons in developed economies, advocacy was made for India's membership in international medical devices forums to promote globalization and harmonization of regulations.

Role of MedTech in Healthcare

The pivotal role of MedTech as an enabler within the healthcare ecosystem, facilitating improved outcomes and patient safety, was underscored. The necessity of technology in scaling healthcare delivery and connecting various stakeholders for value-based care was emphasized.

Regulatory Capacities in the Age of Technology

The significance of regulatory capacities in navigating the complexities of software-driven medical devices was highlighted. Stress was laid on the need for thorough verification, clinical validation, and analytical validation processes to ensure safety and efficacy. Calls were made for interdisciplinary collaboration and enhanced industry interaction to address emerging regulatory challenges.

Facilitating Indigenous Manufacturing

Key recommendations for advancing indigenous manufacturing were outlined, including incentivizing existing investors in the preferential procurement policy and implementing a single-window scheme for faster approvals. Emphasis was placed on reducing bureaucratic hurdles and streamlining processes across ministries to enhance ease of doing business.



Mr. Vishnu Bhatt
Chairman and MD, Blueneem



Ms. Shobha Mishra Ghosh
Director & Head, Govt. Affairs & Policy, India & South Asia, GE HealthCare

Promoting R&D and Innovation

Advocacy for a stronger focus on research and development (R&D) to drive innovation in the MedTech sector was presented. Calls were made for government support and incentives to enable small organizations to undertake costly, time-intensive R&D endeavors. Stress was laid on the importance of clarity in regulations to foster a conducive environment for bringing disruptive innovations to market.

Integration of AI and Emerging Technologies

The panel emphasized the integration of AI, machine learning, and data analytics into medical technology, recognizing their potential to revolutionize healthcare delivery. They stressed the importance of training AI with relevant data sets to ensure accuracy and effectiveness in clinical settings.

Ensuring Patient Safety

Concerns regarding patient safety, particularly in hospital medical device usage, were discussed. The panel highlighted the need for regular maintenance and service of medical equipment to mitigate risks and ensure optimal performance. They advocated for standardized procedures like those in the automobile industry to monitor and maintain medical devices.

Evolution of Regulatory Framework

The evolving nature of regulatory frameworks in response to technological advancements was addressed. The panel acknowledged modern medical devices' interdisciplinary and inter-technology nature and called for regulatory frameworks to adapt accordingly. They stressed the importance of collaboration between industry stakeholders and regulatory bodies to ensure compliance and safety.

Promoting Innovation and Adoption

Efforts to promote innovation and adoption of new technologies within the healthcare system were highlighted. The panel discussed the challenges startups face in bringing innovative products to market and suggested avenues for collaboration between industry, government, and healthcare providers to facilitate the adoption and diffusion of new technologies.

Quality Standards and Technology Transfer

Discussions revolved around the importance of defining quality standards and

**Mr. Sudhakar Mairpady**

*Director, Govt Affairs, Regulatory, South Asia,
Becton and Dickinson India Pvt. Ltd.*

parameters for medical devices to ensure reliability and effectiveness. The panel outlined initiatives to enhance technology transfer and improve access to innovative medical devices. They emphasized the need for robust testing and validation processes to build trust in new technologies.

The imperative of a robust regulatory framework and supportive policies to propel indigenous manufacturing and innovation in the Indian MedTech sector was highlighted. By incorporating best global practices, incentivizing R&D, and streamlining regulatory processes, stakeholders could navigate compliance challenges and harness the sector's full potential for sustainable growth and improved healthcare outcomes.

Key Takeaways

- Implement policies to incentivize indigenous innovation & manufacturing.
- Strengthen regulatory frameworks to ensure predictability, stability, and compliance, drawing from global best practices.
- Promote research and development (R&D) through government support and incentives, enable innovative projects & disruptive technologies.
- Integrate AI, machine learning, and data analytics into medical technology.
- Ensure patient safety through standardized procedures, regular maintenance of medical equipment, and stringent quality standards.
- Adapt regulatory frameworks to the evolving nature of technology.
- Facilitate technology transfer and access to robust testing & validation processes.
- Promote innovation between industry, government, and healthcare providers.
- Address challenges faced by startups in bringing innovative products to market, foster collaboration, and provide support for diffusion of new technologies.

Plenary Session

Skilling Allied Healthcare
Professionals: Unlocking the base
of Pyramid

Knowledge Partner
Plenary Session



Introduction

Empowering Allied Healthcare Professionals: Challenges and Solutions



Mr. Daljit Singh
Past President, NATHEALTH

The plenary session began with an introduction and welcome remarks, setting the agenda for the discussion. Key messages from previous sessions were highlighted, emphasizing the importance of asking the right questions, fostering an ecosystem for improvement, and taking ownership of solutions.

Understanding the Role of Allied Healthcare Professionals: The critical role of allied healthcare professionals in various healthcare settings was emphasized, including diagnostics, home care, and hospitals. Despite their significance, there was a lack of ownership and investment in this group, particularly in larger healthcare setups.

Challenges and Current State: The structural classification of allied health professionals into ten broad categories with 55 defined roles was discussed. Persisting challenges, such as inadequate healthcare professionals in India, were highlighted, with ratios remaining low despite population growth. A comparison with other countries' ratios underscored the shortage of skilled professionals in India's healthcare system.

Issues and Solutions: Several issues plaguing the allied healthcare sector were identified, including poor availability, inadequate quality, high turnover rates, and low remuneration. Efforts such as establishing training centers were acknowledged, but there was a mismatch between training output and industry requirements. Solutions were sought through capacity building, making the role attractive, and integrating allied healthcare professionals into the larger healthcare ecosystem.

Questions for Panel Discussion: Three questions were posed to the panel: how to increase capacity while maintaining quality, how to make the role of allied healthcare professionals attractive, and how to integrate them into the healthcare delivery system. The emphasis was on finding actionable solutions to healthcare challenges.

Keynote Address

Transforming Healthcare: Empowering Allied Health Professionals



Prof. Paul Lalvani

Founder and Executive Director, Empower School of Health (New Delhi, Geneva, New York)

The speaker introduced their role as the founder and executive director of Empower School of Health, highlighting extensive experience in the UN system and various developing countries. The vision behind founding Empower School of Health was explained, emphasizing the need to address the shortage of skilled healthcare professionals.

Current Healthcare Landscape and Challenges: The evolving healthcare landscape was acknowledged, with opportunities presented by aging populations and technological innovations. However, challenges due to the shortage of human resources in the healthcare sector, particularly allied health professionals, were also highlighted.

Issues with Allied Health Professionals: Various issues plaguing the allied health sector were outlined, including shortages, competency gaps, high attrition rates, and dissatisfaction among professionals. The speaker emphasized the mismatch between the supply and demand for skilled professionals, leading to a loss-loss situation for both sides.

Vision for Change and Stakeholder Roles: A vision for creating an industry-driven, government-supported ecosystem for allied health professionals was presented. The roles of key stakeholders, including governance bodies, educational institutions, funding organizations, and healthcare providers, were delineated in achieving this vision.

Proposed Solutions and Initiatives: The concept of the "H capsule" was introduced, focusing on health capacity building, skilling, upskilling, and employment. Ongoing initiatives with government bodies, academic institutions, and international organizations were discussed, aimed at addressing the challenges in the healthcare workforce.

The keynote address concluded with a call for collaboration and open discussions to explore solutions further. The importance of bringing more stakeholders into the ecosystem to drive positive change in the healthcare sector was emphasized.

Plenary Session Skilling Allied Healthcare Professionals: Unlocking the base of Pyramid

Panel Discussion: Opportunities and ideas ahead for revolutionizing medical education

Moderator: Mr. Rajnish Gupta, Partner, Tax & Economic Policy Group, EY

Experts:

- Dr. Shubnum Singh, Principal Advisor, Healthcare Confederation of Indian Industry (CII), Advisor- and Governing board Member Health Sector Skills Council, Governing Board Member Life Sciences Sector Skills Council
- Mr. Ashish Jain, Chief Executive Officer, Healthcare Sector Skills Council (HSSC)
- Mr. Raajiv Singhal, Founding Member, Managing Director and Chief Executive Officer, MarengoAsia
- Prof. Sarang Deo, Professor, Operations Management, Indian School of Business



Experts during the panel discussion

Opportunities and ideas ahead for revolutionizing medical education



Dr. Shubnum Singh

Principal Advisor, Healthcare Confederation of Indian Industry (CII), Advisor- and Governing board Member Health sector skills council, Governing Board member Life Sciences Sector Skills Council



Mr. Ashish Jain

CEO, Healthcare Sector Skills Council (HSSC)

The panel discussion, "Opportunities and Ideas for Revolutionizing Medical Education," brought together various speakers from various backgrounds, including healthcare education, industry, and academia.

Critical Themes in Medical Education

The panelists discussed critical themes in medical education, emphasizing the importance of allied healthcare workers and their challenges. They explored the evolving role of allied health workers in healthcare delivery and the need for recognition and support from educators and employers.

Demographic Trends and Economic Opportunities

The Panel highlighted demographic trends and economic opportunities in healthcare, emphasizing India's potential as a \$26 trillion economy by 2047. By 2030, India is projected to have a billion people in the working-age population, creating an opportunity for robust economic growth. Additionally, by 2050, the country may have over 350 million people aged 60 or above, highlighting the need for a well-trained healthcare workforce to cater to an aging population.

Challenges in Allied Health Education

The critical yet often overlooked role of allied health professionals (AHPs) in healthcare delivery was highlighted. Despite their significance, AHPs face challenges such as societal perception, lack of recognition, and limited growth opportunities. The discussion underscored the need to address these challenges to elevate the status and effectiveness of AHPs in the healthcare ecosystem.

Importance of Skilling and Training

The paramount importance of skilling and training for all healthcare professionals, including AHPs, was emphasized. The need for industry collaboration to develop standardized training programs aligned with industry needs was highlighted. A well-skilled healthcare workforce is essential for delivering quality patient care and improving healthcare outcomes.



Mr. Raajiv Singhal
*Founding Member, Managing Director, and
Chief Executive Officer, MarengoAsia*



Prof. Sarang Deo
*Professor, Operations Management,
Indian School of Business*

Employer Perspectives and Training Initiatives

Insights from the perspective of healthcare employers and discussion of training initiatives to address skill gaps among AHPs were shared. The importance of collaborative efforts between industry and government to enhance training outcomes and ensure the successful integration of AHPs into healthcare delivery settings was emphasized.

Global Perspectives on Healthcare Delivery

Examples from Thailand, Kenya, and the United States were provided to showcase different approaches to healthcare delivery and workforce development. Thailand's cost-effective and efficient healthcare system, Kenya's successful model of home healthcare support, and the United States' initiatives to add new allied health professions and streamline training programs were highlighted.

Role of Hospital Management

The role of hospital management in promoting the integration of allied health professionals into healthcare delivery is critical. The panel emphasized the need for a business case for investing in allied health professionals and highlighted the potential for community-based healthcare models to enhance access to care.

Recommendations for a better outcome

1. Implement the Allied Health Bill swiftly to ensure standardized training for doctors and nurses in India, enhancing their international portability.
2. Empower individuals legislatively and judicially through acts like the Medical Council of India Act and the Nursing Council Act, enabling roles like nurse practitioners and surgical assistants.
3. Establish institutions that recognize and promote career progression, mirroring the governance and administrative structures of large hospitals. This will encourage societal change and attract talent to critical areas like radiology and genomics.

Optimizing training cost and duration

- Utilize micro-credit systems embedded in the national education policy to provide shorter-duration training with the possibility of stacking credits towards higher qualifications.
- Encourage industry participation in training programs to enhance retention and skill development among existing staff.

- Leverage government-funded initiatives like apprenticeship schemes to engage trainees for longer durations while providing hands-on learning experiences.

Optimizing training cost and duration

1. Utilize micro-credit systems embedded in the national education policy to provide shorter-duration training with the possibility of stacking credits towards higher qualifications.
2. Encourage industry participation in training programs to enhance retention and skill development among existing staff.
3. Leverage government-funded initiatives like apprenticeship schemes to engage trainees for longer durations while providing hands-on learning experiences.

Accreditation and certification

1. Utilize existing accreditation systems to recognize standardized qualifications and skill levels, both nationally and globally.
2. Consider specific accreditation programs for skilled health professionals to facilitate career progression and recognition within the industry.

Soft skills and managerial training

1. Recognize the importance of soft skills alongside technical expertise, especially for front-facing healthcare professionals, through continual development programs within organizations.
2. Implement People Development Offices (PDOs) to ensure ongoing training and development, focusing on empathy, communication, and patient care.

Leveraging online education

1. Harness technology for standardized, scalable, and sustainable training programs, facilitating easy access to quality education across different languages and regions.
2. Implement turnkey systems and open-source platforms to deliver pre-assessment, post-assessment, certification, and verification processes efficiently.
3. Emphasize the three S's of technology adoption: Standardization, scalability, and sustainability to ensure continuous learning and adaptation to evolving healthcare needs.

Key Takeaways

- Swift implementation of the Allied Health Bill to standardize training for doctors and nurses, enhancing international portability & addressing workforce shortages.
- Empowerment through judicial acts like the Medical Council of India Act and Nursing Council Act, enabling roles of nurse practitioners & surgical assistants.
- Establishment of institutions promoting career progression to critical areas like radiology and genomics, mirroring large hospital governance structures.
- Utilization of micro-credit systems in the National Education Policy for shorter-duration trainings, higher qualifications, and optimize training cost and duration.
- Industry participation in training programs to enhance retention and skill development among existing staff, leveraging government-funded apprenticeship.
- Utilization of existing accreditation systems to recognize standardized qualifications and skill levels, both nationally and globally.
- Implementation of People Development Offices (PDOs) to ensure ongoing soft skills training, focusing on empathy, communication, and patient care.
- Harnessing technology for scalable and sustainable online training programs, ensuring easy access to quality education across different languages and regions.
- Emphasis on standardization, scalability, and sustainability in technology adoption for continuous learning and adaptation to evolving healthcare needs.

Plenary Session

Leapfrog: Innovations to Power
the Next Wave of Healthcare

Knowledge Partner
Plenary Session



Introduction

Driving Innovation: Startups and AI in Healthcare



Dr. Shравan Subramanyam

Immediate Past President, NATHEALTH and Advisor, Healthcare & Med-tech Investments-Premji Invest

In the recent gathering, the speaker set the stage for an engaging event with enthusiasm and gratitude. The event was marked by the participation of various startups presenting their pitches, a notable shift from previous engagements. Initially, startup interactions were relegated to peripheral spaces, but this year, they took center stage, reflecting their potential to revolutionize healthcare.

Promoting startups at the summit: In the past five to six years, NATHEALTH's engagement with startups has evolved significantly. Initially, they were positioned outside the main hall, then in the basement, and now they hold a prominent place in the plenary session. This marks a milestone as they are poised to revolutionize healthcare. As stakeholders in the healthcare industry, we urge attendees to provide feedback, invest in, and purchase products from these startups, thereby offering crucial support for their growth and success.

Evolution of Technological Engagement: The speaker reflected on the evolution of India's engagement with technology, particularly in artificial intelligence (AI). Drawing a comparison over the years, from a misinterpretation of investment intentions to recent commendation from industry leaders like Satya Nadella, it became evident that India's technological prowess has garnered international recognition.

The Rise of AI in Healthcare: Amidst this technological evolution, the integration of AI into healthcare emerged as a significant discussion point. Speculation arose regarding the potential transformation of traditional healthcare models, with AI potentially assuming various roles, including those traditionally held by radiologists. The convergence of technology, policy support, and favorable funding avenues created a conducive environment for startups to thrive and contribute to this transformative journey.

Opportunities and Challenges in Healthcare Innovation: Acknowledging the opportunities and challenges in the healthcare sector, the speaker emphasized the critical role of startups in driving innovation. Despite statistically low per capita expenditure on medical technology, a burgeoning aging population and increasing healthcare spending signaled

a promising trajectory for healthcare innovation. The curated selection of startups for the event reflected a robust response from the entrepreneurial ecosystem, underscoring the sector's dynamism.

Acknowledgment and Appreciation: Expressing gratitude to participants and organizers alike, the speaker highlighted the collaborative efforts that culminated in the event's success. Special mention was made of initiatives like T-Hub, a public-private partnership fostering innovation, and the esteemed jury and panelists who would provide valuable insights to participating startups.

Anticipation for Future Engagements: Concluding with anticipation for the forthcoming sessions, the speaker promised a rewarding experience for attendees, culminating in a shared dinner. The event's agenda promised diverse discussions, including a fireside chat featuring industry experts, setting the stage for an enriching exchange of ideas and insights.

Plenary Session: Leapfrog: Innovations to Power the Next Wave of Healthcare

Fireside Chat: Innovations to Power the Next Wave of Healthcare

Moderator: Mr. Amit Mookim, Managing Director, IQVIA South Asia

Experts:

- Dr. Indu Bhushan, Former Founding CEO, National Health Authority (NHA) & Ayushman Bharat – Pradhan Mantri Jan Arogya Yojana (AB-PMJAY)
- Mr. Sujit Jagirdar, Chief Innovation Officer, T-Hub



Experts during the panel discussion

Fireside Chat: Innovations to Power the Next Wave of Healthcare

There has been a notable evolution since the inception of NATHEALTH's engagement with startups about five to six years ago. Initially, startups were positioned outside the main hall, then in the basement, and now they hold a prominent place in the plenary session. This shift underscores their potential to revolutionize healthcare. As stakeholders in the healthcare industry, attendees were urged to provide feedback, invest in, and purchase products from these startups to support their growth and success.

Changing Landscape: Post-Pandemic Innovations

The past few years have witnessed significant shifts, especially in the wake of the pandemic, geopolitical dynamics, and technological advancements. The pandemic catalyzed discussions on the potential of technology in healthcare, prompting conversations on its transformative role. This wave of technological innovation has sparked imagination and highlighted the pivotal role startups can play in reshaping healthcare.

Diverse Engagements with Startups

Diverse engagements with startups have been pivotal in driving innovation in healthcare. Platforms like T-Hub have played a significant role in incubating and accelerating startups, with close to 2,000 startups incubated over nine years. T-Hub's initiatives, including curated programs and prototyping centers, have provided crucial support to startups at various stages of development.

Innovation in Healthcare: Perspectives and Dimensions

Innovation in healthcare, particularly in the context of large-scale programs like the Pradhan Mantri Jan Aarogya Yojana (PMJAY), has been multidimensional. PMJAY's ambitious launch within six months required innovative IT solutions to manage data, eligibility verification, treatment tracking, and payment processes. The successful implementation of PMJAY underscored the critical role of IT innovation in enabling large-scale healthcare initiatives.

Digital Health Mission: Potential and Challenges

The National Digital Health Mission (NDHM) holds immense potential to transform the healthcare landscape, akin to the success of UPI in the financial sector. However, the journey towards digital transformation in healthcare entails unique challenges, including data digitization, interoperability, and stakeholder alignment. Despite the challenges, NDHM offers promising prospects for innovation and improved access to healthcare services.

Navigating Data Fragmentation and Integration

Data fragmentation poses a significant challenge in healthcare, with multiple stakeholders grappling with data silos and interoperability issues. Integrating diverse healthcare data sources is essential for driving innovation and improving patient outcomes. Initiatives like consortiums and collaborative frameworks aim to address these challenges by fostering data sharing and interoperability among stakeholders.

Supporting Startup Success: Curated Programs and Partnerships

The high mortality rate among startups underscores the need for comprehensive support mechanisms. Curated programs, spanning ideation, design, MVP development, access to markets, and funding readiness, are critical in nurturing startup success. Collaborative partnerships with corporations, hospitals, and research institutions provide startups with essential resources and validation opportunities.

Addressing Access Gaps in Healthcare

Despite advancements, access to healthcare remains a significant challenge, necessitating innovative solutions. Digital health initiatives, such as telemedicine and remote monitoring, offer promising avenues to bridge access gaps and enhance healthcare delivery. Leveraging technology to augment workforce productivity and enable home-based care can significantly improve access to quality healthcare services.

Navigating Regulatory Challenges and Financial Barriers

Startups face regulatory hurdles and financial constraints when bringing medical products to market. Streamlining regulatory processes and exploring alternative financing models, such as blended finance facilities, can help startups navigate these challenges. Collaborative approaches involving public-private partnerships and innovative funding mechanisms are essential for fostering a conducive ecosystem for healthcare innovation.

Promoting Collaboration and Investment in Healthcare

Creating conducive ecosystems for healthcare innovation requires collaboration among stakeholders and strategic investments. Platforms like T-Hub facilitate interactions between startups, investors, and industry experts, fostering collaboration and investment opportunities. Initiatives that incentivize partnerships and provide support for regulatory compliance and market access can accelerate the growth of healthcare startups.

In conclusion, the fireside chat and startup pitch sessions underscored the transformative potential of innovation in powering the next wave of healthcare. By addressing regulatory challenges, fostering collaboration, and supporting startup success, stakeholders can collectively drive innovation and improve access to quality healthcare services. Embracing technology and fostering a culture of innovation is key to realizing the full potential of healthcare innovation in addressing global health challenges.

Startup Pitch Session

Exploring Healthcare Innovation: HealthTech Pitch Session and Expert Panel



Ms. Krithika Sivaraman

Senior Vice President, Investment Banking, Indium Capital

In recent years, a noticeable surge in technology-driven innovations within the healthcare and medical technology sectors has occurred. This trend aligns with the increasing technology adoption and is further propelled by significant venture capital interest and government initiatives. While much attention has been given to startups focusing on direct-to-consumer services such as online consultations, medicine deliveries, and home diagnostics, there exists a diverse array of startups targeting solutions within hospital settings and for healthcare providers.

These startups cater to various aspects, including clinical management, in-patient care solutions, therapeutics, and medical devices. Key success drivers for such startups are access to hospitals, healthcare providers, and patient capital. In collaboration with Nath Health, Dr. Shravan Subramanian, the IQVR team, and Indium Capital, a curated pitch session were organized to facilitate interactions between healthcare leaders, founders, and health tech startups.

The primary objective is to enable healthcare leaders and founders to explore potential collaborations with these startups while providing the startups with an opportunity to present their innovations to a room filled with potential customers and investors. A panel of experts, comprising investors, advisors, and healthcare providers, was assembled to offer valuable insights and feedback to the participating startups.

This diverse panel brought together expertise from various sectors, offering a holistic perspective on healthcare innovation, investment, and delivery.

The pitch session featured presentations from five shortlisted startups representing different areas of healthcare innovation, including data-driven healthcare and analytics, AI platforms for diagnostics, medical devices, and insurance.

HealthTech Startup Pitch Session: Pitch by 4 Startups

Expert Panel:

- Dr. Harsh Mahajan, Past President, NATHEALTH and Founder and Chief Radiologist, Mahajan Imaging
- Mr. Daljit Singh, Past President, NATHEALTH
- Dr. Shravan Subramanyan, Past President, NATHEALTH and Advisor-Healthcare & MedTech Investments, Premji
- Mr. Shivinder Mohan Singh, Past President, NATHEALTH
- Mr. Anjan Bose, Founding Secretary General, NATHEALTH
- Mr. Amit Mookim, Managing Director, South Asia, IQVIA
- Mr. Nitish Agarwal, Managing Director, Indium Capital Advisors
- Mr. Parthiv Neotia, Executive Director, Neotia Healthcare
- Mr. P.L. Mehta, Vice Chairman & Managing Director, Neotia Healthcare
- Mr. Mukul Bagga, Advisor, Digibridge Healthcare Private Limited



Experts panel of Startup pitch session

Promaxo: Revolutionizing MRI and Robotics in Healthcare

Promaxo, founded by a team of entrepreneurs and healthcare innovators, is dedicated to developing a minimally invasive and patient-centric MRI and robotic platform. Their mission revolves around enhancing lives through cutting-edge imaging robotics and AI capabilities.



Dr. Amit Vohra

Founder, President and CEO, Promaxo

The company focuses on building a portable MR platform with proprietary robotics to enable outpatient procedures, making MRIs adaptable and flexible for outpatient settings. With a vision extending beyond imaging to include interventions under MRIs, particularly in the field of prostate health, Promaxo aims to redefine healthcare delivery.

Impressive growth trajectories position Promaxo as one of the fastest-growing medical device companies in the US, with notable achievements such as a 47% gross margin and \$45 million in bookings backed by over 250 patents. Their success in the prostate market underscores their potential impact, with a significant market potential estimated at \$3 billion annually.

Promaxo's MRI platform represents a breakthrough in accessibility and usability, designed to fit through standard doors and requiring no shielding or infrastructure. With MR-compatible robots and AI integration, they enhance imaging capabilities and diagnostic accuracy.

In addition to prostate health, Promaxo explores expansion into other medical areas such as female pelvic health, obstetrics and gynecology, kidney health, and breast cancer diagnostics. Their commitment to research and partnerships reflects their dedication to advancing healthcare globally.

Haystacks Analytics: Revolutionizing Genomics in Healthcare

Haystacks Analytics, emerging from IIT Bombay, pioneers clinical genomics products to facilitate accurate and personalized diagnostics. With a vision to make genomics more accessible and applicable to clinical settings, the startup addresses challenges in applicability, accessibility, and affordability.



Dr. Anirvan Chatterjee

Founder and CEO, Haystack Analytics

The founding team, comprising professionals with diverse technical backgrounds, draws from decades of collective experience in microbial genomics, evolutionary biology, biochemistry, and engineering.

They embarked on a journey to reimagine genomics, focusing on infectious diseases relevant to the Indian healthcare landscape.

Key milestones include launching flagship products in tuberculosis diagnostics and strategic partnerships with industry giants like Intel and GE Healthcare. Haystacks Analytics introduces groundbreaking solutions, such as Whole Genome Sequencing (WGS) for tuberculosis and the Universal ID Test for pathogen detection.

Scientific advancements are underscored by publications in renowned journals and validation studies conducted with leading medical institutions, validating the efficacy and reliability of Haystacks' genomic solutions. The company's market expansion extends across India and beyond, with collaborations with international organizations like BMGF and FIND.

A hallmark of Haystacks' solutions is affordability and accessibility, democratizing access to genomic diagnostics without compromising quality. Future prospects involve driving innovation, expanding product portfolios, and forging strategic collaborations to address evolving healthcare challenges globally.

Carpl.ai: Transforming Radiology Practices with AI



Dr. Vidur Mahajan
CEO, Carpl.ai

Carpl.ai, an innovative vendor-neutral artificial intelligence platform, aims to revolutionize radiology practices by seamlessly integrating AI solutions. Addressing challenges in radiology, such as a shortage of radiologists and limited access to diagnostic services, Carpl.ai acts as a bridge between AI applications and healthcare providers.

The platform simplifies the adoption of AI solutions, offering a single user interface, data channel, and procurement channel for healthcare providers. With over 110 applications from 50 vendors, Carpl.ai facilitates a diverse range of AI solutions for various clinical needs, garnering attention from leading healthcare providers worldwide.

Substantial benefits across clinical, operational, and financial metrics are offered, with significant productivity gains, cost savings, and improved patient outcomes through AI-driven solutions. Future prospects involve expanding capabilities to address evolving healthcare challenges and deliver superior outcomes for patients and providers alike.

Innovation: Advancing MedTech Innovation



Mr. Praveen Daga
Head of Marketing, Innvolution

Innovation, a notable MedTech startup, has made significant strides in revolutionizing medical imaging and cardiovascular interventions. Established in 2010, Innvolution initially operated as a sales and commercial distribution company before venturing into manufacturing in 2016, culminating in a merger with Alpha to become a leading manufacturer of cutting-edge medical devices.

Led by a team of seasoned professionals with extensive experience in the cardiology space, Innvolution boasts a diverse product portfolio, including drug-eluting stents, balloon catheters, guide wires, and accessories. Noteworthy achievements include capturing market share, achieving robust financial performance, and expanding market presence both domestically and internationally.

With ongoing projects in artificial intelligence, vascular robotics, and remote tele-cardiology, Innvolution remains committed to innovation and growth. As they strive to install cath labs across all 800+ districts in India by 2030, Innvolution exemplifies determination, ingenuity, and unwavering commitment to improving healthcare delivery globally.



Certificates awarded to the Startups

Key Takeaways

- Ensure startups receive feedback and investments in healthcare events.
- Integrate AI into healthcare, foster revolutionizing traditional healthcare models.
- Foster diverse engagements with startups through platforms like T-Hub, providing crucial support in terms of incubation, acceleration, and access to markets.
- Encourage innovation in clinical management, medical devices, to address diverse healthcare challenges effectively.
- Address challenges of data fragmentation by fostering data integration and sharing among stakeholders.
- Offer curated programs and partnerships that support startups at various stages of development, including ideation, design, market access, and funding readiness.
- Leverage digital health initiatives to augment workforce productivity.
- Streamline regulatory processes and explore alternative financing models to help startups overcome regulatory hurdles and financial barriers.
- Focus on developing solutions that prioritize patient needs and improve healthcare delivery, ensuring affordability, accessibility, and quality of care.

Plenary Session

Accelerating Healthcare Digitization in
India: Conquering the Digital Frontier

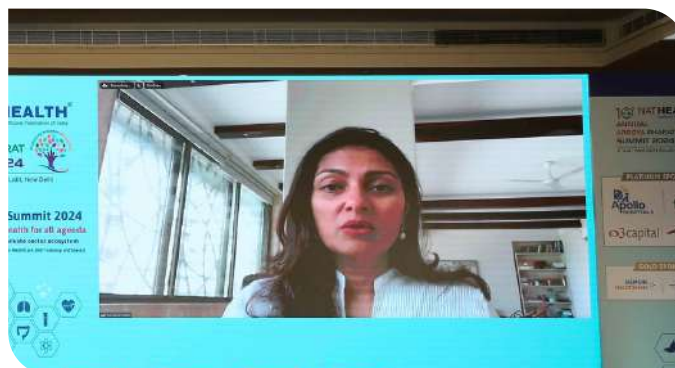
Knowledge Partner
Plenary Session

ARTHUR LITTLE



Introduction

Driving Healthcare Digitization: Challenges, Imperatives, and the Vision for India



Ms. Ameera Shah

Senior Vice President, NATHEALTH and Managing Director, Metropolis Healthcare

The theme, "Accelerating Healthcare Digitization in India and Conquering the Digital Frontier," underscored the urgency of embracing digital technologies to revolutionize healthcare delivery in the country. As technology advances, consumer trends evolve, and patient expectations shift, the healthcare landscape undergoes rapid transformation.

Digital Health Solutions: Catalysts for Change: Digital health solutions emerge as central drivers of this transformation, offering unprecedented opportunities for stakeholders across the healthcare spectrum. For the private sector, embracing digitalization presents avenues for leadership, innovation, and societal impact. It enables increased access to healthcare services while driving growth and profitability.

Challenges and Imperatives for Change: While the landscape is ripe with opportunity, challenges persist, necessitating proactive measures for change. Key challenges outlined include:

1. Lack of clear guidelines for data management under ABDM.
2. Investment requirements and concerns about cost-benefit dynamics.
3. Data security uncertainties and the need for robust protocols.
4. Low penetration of ABHA IDs due to awareness gaps.

Addressing these challenges requires collaborative efforts between the public and private sectors, policymakers, and technology providers. Imperatives for driving ABDM penetration include effective engagement, clear data integration guidelines, technical support, and increased stakeholder awareness.

Ensuring Data Security and Compliance: Data security emerges as a critical concern, necessitating regulatory clarity, increased awareness, and broad-based enforcement of data protection policies. Implementing the Digital Personal Data Protection Act requires comprehensive strategies to ensure compliance across all levels of the healthcare industry.

Creating Pull for Adoption: To drive adoption, efforts must focus on creating pull from consumers, incentivizing usage, and mandating Aabha ID for certain healthcare interactions. Government mandates, provider incentives, and payer requirements can stimulate demand and promote the widespread adoption of digital health solutions.

The Vision for Digital Health in India: The Indian government's visionary initiatives lay the groundwork for a digital future in healthcare. Central to this vision is the Aabha ID, which promises accessibility, efficiency, and quality in healthcare services. However, without compliance standards and quality benchmarks, rapid digitalization risks exacerbating data privacy issues and operational inefficiencies.

As stakeholders convene to accelerate healthcare digitization, collective expertise and commitment are paramount. Proactive government action, joint initiatives between public and private sectors, and a holistic approach to integration are essential to realizing the transformative potential of digital health. By harnessing the opportunities presented by digitalization, stakeholders can pave the way for a more accessible, efficient, and patient-centric healthcare system in India.

Introduction

Journey from Digitization to Digital Transformation in Healthcare



Dr. Om Manchanda

Managing Director, Dr. Lal PathLabs Limited

In reflecting on the evolving healthcare technology landscape, the journey of digitization, digitalization, and digital transformation emerges as a pivotal narrative. While not a technologist by trade, the speaker brought insights from years of navigating technological shifts within their business, particularly amid the challenges posed by the COVID-19 pandemic.

Defining the Journey: From Digitization to Digital Transformation: The distinction between digitization, digitalization, and digital transformation sets the stage for understanding the trajectory of technology adoption in healthcare. Digitization, dating back to the 1970s, focused on transitioning paper-based processes to digital formats. However, it was not until digitalization that enterprises began automating processes on an enterprise-wide scale, integrating systems like ERP for enhanced efficiency.

The Era of Digital Transformation: Digital transformation represents the current stage, characterized by a holistic shift towards digital ecosystems that transcend organizational boundaries. With consumers and patients equipped with smartphones, the digital landscape extends beyond individual enterprises, forming interconnected ecosystems. This interconnectedness presents opportunities and challenges, particularly in ensuring data privacy and confidentiality.

Navigating the Healthcare Landscape: The speaker reflects on their experiences as both a provider and a patient within the healthcare system, highlighting the gaps in digital integration. While certain aspects, such as billing and laboratory reporting, have undergone digitization, critical components like clinical history and prescriptions remain primarily manual. This fragmentation impedes the realization of true digital transformation within healthcare delivery.

The Promise of ABDM: The Aadhaar-based Digital Mission (ABDM) emerges as a promising initiative to address these challenges, aiming to unify disparate healthcare data into a cohesive digital framework. However, before realizing the full potential of

ABDM, standardization within the healthcare industry is paramount. Fragmentation in test codes, testing platforms, and reference ranges underscores the need for harmonization.

Building a Unified Healthcare Ecosystem: Achieving a 360-degree view of patient data necessitates collaboration across healthcare stakeholders, including diagnostics, hospitals, and pharmaceuticals. ABDM seeks to facilitate data interoperability, enabling seamless data exchange among providers. The speaker emphasized the transformative potential of such initiatives in streamlining healthcare delivery and improving patient outcomes.

Challenges and Opportunities: While the journey towards digital transformation is underway, significant challenges persist. Senior management commitment, investment in resources, and talent acquisition are essential for driving technological advancements within healthcare organizations. The speakers shared their company's progress in adopting ABDM principles, positioning themselves as pioneers in data interoperability.

As the healthcare industry progresses along the continuum of digitization, digitalization, and digital transformation, collaborative efforts are paramount. The speaker expressed optimism about the future, particularly in realizing the use cases enabled by digital innovation. With ongoing initiatives like ABDM, the vision of a unified, digitally-enabled healthcare ecosystem draws closer to fruition.

Keynote Address

Charting the Course for Digital Health: Insights and Recommendations



Mr. J. Satyanarayana

Chief Advisor, C4IR India, World Economic Forum and Former Chairman, UIDAI

Reflecting on the digital health journey, the speaker shared their experiences from years past when they held positions of influence, including chairing Aadhaar and advising the National Health Authority. They recalled being part of the team that swiftly launched the PMJAY program within a record hundred days.

Laying the Foundation: The National Digital Health Blueprint: Drawing from their involvement in shaping digital health policies, the speaker emphasized the importance of initiatives like the National Digital Health Blueprint, which laid the groundwork for endeavors such as the Aadhaar-based Digital Mission (ABDM).

Navigating Early Stages: Challenges and Opportunities: While progress had been made, the speaker acknowledged that the journey was still in its early stages. They posed critical questions about how to effectively advance digital health initiatives and make them accessible and impactful for all.

A Two-Pronged Approach: Push and Pull Mechanisms: Proposing a two-pronged approach, the speaker advocated for both push and pull mechanisms to drive progress in digital health. They outlined specific strategies to foster a holistic and person-centric digital healthcare system.

Push Mechanisms: Empowering Primary Healthcare: The speaker emphasized the importance of prioritizing primary healthcare (PHC) and reimagining it as the cornerstone of the healthcare system. They advocated for PHC-centric solutions and the adoption of lightweight standards tailored to PHC settings.

Pull Mechanisms: Leadership from Providers: On the flip side, the speaker called for leadership from healthcare providers, both large and small, including government entities. They highlighted the need to leverage core building blocks like ABDM, establish health lockers, and ensure regulatory compliance.

Harnessing Regulatory Frameworks: Building Trust and Security: Addressing data privacy and security concerns, the speaker underscored the importance of robust regulatory frameworks. They advocated operationalizing existing legislation to instill trust and accountability within the digital health ecosystem.

Capacity Building: Bridging the Gap between IT and Healthcare Professionals: Lastly, the speaker emphasized the need for capacity building, particularly in bridging the gap between IT and healthcare professionals. They stressed the importance of convergence to ensure seamless technology integration into healthcare delivery.

In closing, the speaker shared ten recommendations to advance digital health initiatives. Drawing parallels to past successes like Aadhaar and UPI, they expressed optimism about the transformative potential of digital health in India.

Launch of Digital Health Course: Digital Health Masterclass (DHMC)



Dr. Rizwan Koita

Co-founder, Koita Foundation and Co-founder, CitiusTech

Digital Health Masterclass: Empowering Small Hospitals

Digital health has emerged as a transformative force in various sectors of India's economy. While industries like banking and travel have embraced digitalization, the healthcare sector has been slower to adapt. However, the landscape is changing rapidly, with digital health initiatives gaining momentum, especially under the leadership of the honorable Prime Minister. The Ayushman Bharat Digital Mission (ABDM) stands out as a pivotal initiative to make healthcare information more accessible and shareable nationwide.

Challenges in Healthcare Transformation: One of the significant challenges in India's healthcare transformation lies in bridging the gap between providers, especially given the large number of small hospitals and clinics that dominate the landscape. Unlike larger institutions, these smaller entities often face unique challenges in adopting digital tools due to limited resources and expertise.

The Role of HMIS and EMR: Among the digital tools gaining traction in healthcare are Hospital Management Information Systems (HMIS) and Electronic Medical Records (EMR). These systems provide a structured workflow for care coordination, spanning from admission to discharge and beyond. By leveraging HMIS and EMR, hospitals can achieve operational efficiency, improve clinical care, and drive business growth.

Introduction to the Digital Health Masterclass (DHMC): To address the challenges small hospitals face in adopting digital health solutions, NATHEALTH, in collaboration with PwC and Koita Foundation, launched the Digital Health Masterclass (DHMC). This initiative empowers hospital leaders to implement HMIS and EMR systems effectively.

Key Objectives of DHMC: DHMC seeks to provide hospital leaders with the knowledge and resources necessary to navigate their digital health journey. The course is designed as a four to five-hour in-person workshop, focusing on practical insights and actionable strategies. Participants will learn how to select, implement, and optimize HMIS and EMR systems within their budget constraints.

Resource Kit and Support: In addition to the workshop, DHMC participants will receive a comprehensive resource kit containing essential tools and templates. This kit includes guidance on selecting an EMR, drafting RFPs, identifying key success factors, and managing potential risks. The goal is to simplify the adoption process and empower small hospitals to take the first step toward digital transformation.

Invitation to Participate: DHMC invited all small and mid-sized hospital leaders to join the movement toward digital health adoption. By embracing HMIS and EMR systems and integrating them into the ABDM ecosystem, hospitals can unlock new possibilities for enhanced care, improved efficiencies, and better financial performance. Together, let's pave the way for a smarter, faster, and more efficient healthcare system in India.

Whitepaper Presentation: Catalyzing Digital Health in India



Mr. Vikas Kharbanda

*Partner, Head, Healthcare and Life Sciences Practice,
Middle East, ADL*

The third edition of the Digital Health Report, produced in collaboration with NATHEALTH, presents a comprehensive overview of the digital health landscape in India. Building upon previous editions, this report delved into the challenges and opportunities surrounding the implementation of digital health infrastructure in the country.

Evolution of the Digital Health Agenda: Since its inception in 2022, the Digital Health Report has aimed to elucidate the potential of digital health in India, particularly in light of the Ayushman Bharat Digital Mission (ABDM). Subsequent editions focused on implementation imperatives to capitalize on this opportunity.

Understanding Implementation Challenges: Three years later, the focus has shifted towards understanding the barriers hindering the widespread adoption of digital health infrastructure. Despite significant potential, adoption rates have not matched initial expectations, prompting an exploration of implementation challenges.

Enabling Factors for Digital Health: Digital health infrastructure presents an unparalleled opportunity to enhance access, affordability, and personalized medicine in India. The healthcare ecosystem can be transformed rapidly by adopting digital tools, such as Hospital Management Information Systems (HMIS) and Electronic Medical Records (EMR).

Progress and Achievements: Data analysis from 2020 to 2023 reveals substantial progress in digital health adoption. Over 56 crore ABHA-IDs have been created, representing nearly 40 percent of India's population. Additionally, over 2.3 lakh facilities and 2.8 lakh health professionals have been registered.

Challenges in Private Sector Adoption: While progress has been made, challenges persist, particularly in the private sector. Despite mandates and push mechanisms in the public sector, adoption rates are lower in private healthcare settings.

Stakeholder consultations highlight barriers such as a lack of understanding of standards, technological barriers, and unclear business cases.

Addressing Adoption Barriers: Efforts to address adoption barriers include stakeholder education, simplification of engagement processes, and creation of awareness around the business case for digital health investment. Additionally, challenges related to data interoperability, competition concerns, and patient engagement are being addressed.

Creating a Pull Mechanism: To encourage adoption, efforts are underway to create a pull mechanism wherein consumers are made aware of the benefits of ABHA-IDs and digital health infrastructure. Case studies highlighting successful adoption and benefits serve to illustrate the potential of digital health initiatives.

Priority Areas for Action: The report identifies four key priority areas for action:

1. Effective engagement between the government and private sector.
2. Standardization and detailing of technology infrastructure.
3. Promotion of ABHA-ID adoption among consumers.
4. Soft push mechanisms to encourage private sector adoption.

In summary, the Digital Health Report presents a structured analysis of the challenges and opportunities in India's digital health landscape. Alongside the report, case studies exemplify the successful adoption of digital health infrastructure, underscoring the potential for transformative change in the healthcare sector.



Whitepaper 'Catalyzing Digital Health in India' released



Mr. Brajesh Singh

President - India, ADL

Exploring Healthcare Digitization: Insights from the Whitepaper

This whitepaper delved into two key verticals: diagnostic and hospital sectors. Emphasizing the importance of strengthening Primary Health Centers (PHCs), the paper underscores the need to bolster medical capacity at the grassroots level.

Challenges and Opportunities: Research across 11 states and 119 Right to Information (RTI) inquiries revealed startling statistics. Despite a population of 1.48 billion, India possesses fewer than one lakh ultrasound machines. Addressing this disparity is crucial to prioritize preventive healthcare initiatives and facilitate greater accessibility to medical technology.

Public-Private Partnerships (PPPs): While Public-Private Partnerships (PPPs) are touted as a solution, the focus shifts to a broader framework encompassing Policy change, Process enhancement, and People awareness. Advocating for a concerted effort akin to the Aadhaar initiative, the paper stresses the need for a similar push for the Ayushman Bharat Digital Mission (ABDM).

Acknowledgment and Publication: In recognition of contributions, individuals and teams involved in the paper's development are acknowledged and thanked. The paper comprises recommendations for accelerating digital health adoption alongside two supporting use cases focused on hospitals and diagnostic sectors.

Recommendations for Acceleration: The paper outlined recommendations for accelerating healthcare digitization, particularly in hospitals and diagnostic sectors. Additionally, it proposes a roadmap for integrating ultrasound systems with the ABDM platform, aiming to streamline processes and enhance accessibility.

In conclusion, the whitepaper served as a comprehensive guide for policymakers, healthcare professionals, and stakeholders involved in the digitization of healthcare services in India. By addressing challenges and highlighting opportunities, it paves the way for a more inclusive and technologically advanced healthcare ecosystem.

Plenary Session Accelerating Healthcare Digitization in India: Conquering the Digital Frontier

Panel Discussion: Accelerating Healthcare Digitization in India: Conquering the Digital Frontier

Moderator: Mr. Hari T, Chief Executive Officer, Call Health

Experts:

- Mr. Amol Naikawadi, Joint Managing Director, Indus Health Plus
- Mr. Anand K, Managing Director & Chief Executive Officer, Agilus Diagnostics
- Mr. Kabir Mahajan, Associate Director, Mahajan Imaging
- Dr. Sameer Gupta, Director, Metro Group of Hospitals and Director, Umkal Hospitals
- Ms. Ratna Devi, Chief Executive Officer, Dakshama Health, Director Patient Academy for Innovation and Research, Founder, Indian Alliance of Patient Groups (IAPG), Chair- ISPOR Patient Council, The Professional Society for Health Economics and Outcomes research
- Ms. Anu Acharya, Chief Executive Officer, Map My Genome
- Mr. Chirag Adatia, Chief Executive Officer India & Asia Pacific, THB



Experts during the panel discussion

Accelerating Healthcare Digitization in India: Conquering the digital frontier



Mr. Amol Naikawadi

Joint Managing Director, Indus Health Plus



Mr. Anand K

Managing Director & Chief Executive Officer, Agilus Diagnostics

The discourse surrounding digital health adoption underscored several critical points. Firstly, any digital initiative's success hinges on consumers' perceived value, whether patients or citizens. Without tangible benefits, efforts to promote adoption remain futile. Secondly, the ownership of health data lies unequivocally with the individual. Establishing trust and confidence in data management is imperative to foster widespread acceptance.

Addressing Accessibility and Reach

Expanding the reach of digital healthcare services to marginalized populations is paramount. While urban centers boast substantial digital infrastructure, attention must be directed towards rural and underserved regions. Leveraging India's high smartphone and internet penetration rates, initiatives can be devised to extend healthcare access to the last mile.

Transitioning to a Patient-Centric Model

Shifting towards a patient-centric healthcare model is imperative. This transition involves teleconsultations and pathology services and extends to various diagnostic modalities such as optometry and audiometry. Innovative approaches, such as mobile medical units in remote regions, demonstrate the feasibility of decentralizing healthcare delivery.

The Four A's of Digital Health

Accessibility, availability, affordability, and acceptability constitute the pillars of digital health advancement. Democratizing access to healthcare resources, disseminating information on service availability, ensuring cost-effectiveness, and fostering trust through user reviews are essential to this paradigm.

Optimizing Capacity and Capability

While augmenting healthcare capacity may pose challenges, optimizing existing resources is feasible. Maximizing the utilization of healthcare facilities and enhancing diagnostic capabilities through technological interventions are avenues for improvement.



Ms. Anu Acharya
Chief Executive Officer, Map My Genome



Mr. Kabir Mahajan
Associate Director, Mahajan Imaging

Addressing Challenges and Accelerating Adoption

Despite significant strides in digital health adoption, the private sector's engagement remains suboptimal. Overcoming this hurdle necessitates a concerted effort to accelerate the adoption and implementation of digital health frameworks. Initiatives aimed at simplification and building trust are pivotal in this endeavor.

Consulting Perspectives

Drawing from consulting experiences across sectors, observations vary across the adoption spectrum. While pockets of resistance exist, robust adoption and implementation exist. Identifying barriers and enablers to adoption is essential for devising tailored strategies to propel digital health initiatives forward.

Consumer Trust and Ease of Use

In discussing the adoption of digital platforms, it's crucial to consider consumer trust and ease of use as pivotal factors. Beyond the commonly discussed aspects, these dimensions significantly influence uptake. Without trust and simplicity, any digital initiative is likely to falter.

Reflecting on personal experiences underscores the importance of trust. A situation where a hospital app transition resulted in the loss of stored data highlights the fragility of digital trust. For consumers, such experiences raise questions about the reliability of digital platforms.

Similarly, ease of use is paramount. Comparing complex identification numbers with user-friendly alternatives like those used in popular payment apps emphasizes the importance of simplicity. Unless platforms are intuitive and user-friendly, consumer adoption remains unlikely.

Awareness and Understanding

Addressing the issue of awareness, it's evident that consumers fall into two categories: those familiar with digital benefits and those entirely unaware. In regions lacking awareness, digital platforms' perceived value diminishes significantly. Moreover, understanding the significance of healthcare data poses a challenge. Unlike financial transactions, where the value is evident, healthcare data's importance may be obscure to many. Without comprehension, consumers hesitate to embrace digital solutions.



Ms. Ratna Devi

Chief Executive Officer, Dakshama Health, Director Patient Academy for Innovation and Research, Founder, Indian Alliance of Patient Groups (IAPG), Chair- ISPOR Patient Council, The Professional Society for Health Economics and Outcomes Research

Interoperability and Integration Challenges

A notable obstacle is the lack of interoperability among healthcare systems. Fragmentation persists, hindering seamless data exchange between different providers and platforms. This fragmentation diminishes the perceived value of platforms like ABHA.

Additionally, integrating diverse healthcare services and records presents a formidable challenge. Existing systems often fail to communicate effectively, limiting the holistic view necessary for comprehensive care delivery.

Language Accessibility

Language accessibility emerges as a critical concern. Platforms primarily designed in English overlook non-English speakers, hindering their ability to engage fully. Ensuring inclusivity demands platforms accessible to diverse linguistic demographics.

Resistance and Adoption Spectrum

The adoption spectrum across the healthcare sector is vast, ranging from traditional practices to fully digitalized entities. Even within established organizations, varying levels of digital integration exist, highlighting the sector's heterogeneous nature.

Challenges persist at multiple levels of digital adoption. Foundational layers like data capture lack comprehensive implementation, while data stack integration remains a distant goal for many. Bridging these gaps necessitates concerted efforts across the industry.

Incentivizing Adoption

Incentivizing adoption requires a multifaceted approach addressing monetary benefits, user experience enhancements, and clinical outcomes. Monetary incentives often drive initial adoption, followed by improvements in user experience and clinical efficacy.

The success of digital initiatives hinges on creating compelling value propositions. Emulating successful models like UPI necessitates simplification and user-centric design, fostering organic adoption through enhanced convenience.

Physician Engagement and Education

Engaging physicians emerges as a critical factor in driving digital adoption. While digital health education remains lacking in traditional medical curricula, physician buy-in is essential for catalyzing patient acceptance. Physicians' endorsement significantly



Mr. Chirag Adatia
Chief Executive Officer India & Asia Pacific, THBs

influences patient behavior, underscoring the need for targeted educational initiatives and institutional support. Collaborative efforts between healthcare providers and digital health advocates can bridge this gap.

Challenges Faced by Diagnostic Labs

Diagnostic labs confront unique challenges in digital adoption, particularly regarding interoperability and patient engagement. Overcoming these hurdles requires both internal digitization efforts and external collaboration with healthcare providers.

Enhancing patient engagement through digital platforms necessitates addressing barriers like cumbersome registration processes and data security concerns. Streamlining processes and incentivizing participation can improve adoption rates.

The Role of Genetics in Personalized Healthcare

Harnessing genetics holds promise for advancing personalized healthcare initiatives. By leveraging genetic insights, healthcare providers can stratify risk, tailor treatments, and preemptively address genetic predispositions.

Moreover, integrating genetics into digital health platforms facilitates holistic health assessments, enabling proactive interventions based on individual genetic profiles. However, effective implementation requires comprehensive data integration and stakeholder collaboration.

The Imperative of Prevention and Population Health

Preventive healthcare initiatives play a pivotal role in improving population health outcomes. Leveraging digital tools for preventive programs requires overcoming challenges like data sharing reluctance and awareness gaps.

Initiatives like ABDM promise to enhance data sharing and interoperability, fostering a continuum of care. However, widespread adoption hinges on raising awareness, addressing implementation barriers, and demonstrating tangible benefits to stakeholders.

In conclusion, navigating the complexities of digital health adoption demands a multifaceted approach addressing trust, usability, interoperability, and education. Overcoming resistance and incentivizing adoption necessitates collaborative efforts across the healthcare ecosystem. By prioritizing patient-centric design, fostering physician engagement, and leveraging emerging technologies like genetics, the healthcare industry can realize the transformative potential of digital health.

Key Takeaways

- Expand digital healthcare services to marginalized populations by leveraging India's high smartphone and internet penetration rates.
- Shift towards a patient-centric healthcare model by decentralizing healthcare delivery through teleconsultations, pathology services, and mobile medical units.
- Focus on accessibility, availability, affordability, and acceptability to democratize access to healthcare resources and foster trust through user reviews.
- Optimize existing healthcare resources to maximize capacity and diagnostic capabilities through technological interventions.
- Overcome hurdles by simplifying and building trust through initiatives to accelerate the adoption and implementation of digital health frameworks.
- Recognize consumer trust and ease of use as pivotal factors by prioritizing intuitive and user-friendly digital platforms in healthcare.
- Improve digital health benefits by addressing language accessibility and interoperability challenges to ensure inclusivity and seamless data exchange.
- Incentivize adoption through monetary benefits, enhanced user experience, and improved clinical outcomes, emulating successful organic models like UPI.
- Engage physicians through targeted educational initiatives and institutional support to catalyze patient acceptance and drive digital health adoption.
- Leverage genetics for personalized healthcare initiatives, integrating insights into digital health platforms for proactive interventions and improved outcomes.

Panel Discussion: Patient Safety



Introduction

Patient Safety: A Global Imperative



Dr. Narottam Puri

*Advisor (Medical), Fortis Healthcare, Principal Advisor,
QCI Advisor— FICCI Health Services and MVT*

In considering the safety of patients within healthcare settings, it is imperative to acknowledge the inherent risks associated with hospital care. Despite the common belief that hospitals are places of refuge where healing occurs, the reality often diverges from this perception. The notion of safety extends beyond the absence of apparent danger to encompass the potential hazards in healthcare environments.

One pivotal moment in recognizing the prevalence of risks within hospitals occurred approximately 25 years ago with the publication of the landmark report "To Err is Human" in 1999. This report, originating from the United States, sheds light on the alarming statistic that between 44,000 to 98,000 patients succumb to hospital-related errors or negligence annually. Notably, a significant portion of these fatalities, approximately 7,000, resulted from medication errors alone.

The revelation of such staggering statistics prompted global introspection into patient safety standards. Subsequent reports from entities such as the National Health Service (NHS) in the United Kingdom and similar findings in Australia underscored the widespread nature of harm experienced by patients within hospital settings. Consequently, international organizations like the Joint Commission International and the World Health Organization (WHO) swiftly responded by issuing patient safety guidelines and goals to mitigate risks and enhance safety protocols.

Over the past few decades, the evolution of patient safety discourse has shifted the narrative from a culture of blame to one of accountability and prevention. Previously, errors were often met with scapegoating, resulting in reputational and financial repercussions for healthcare institutions. However, contemporary perspectives emphasize proactive measures to address systemic vulnerabilities and prevent adverse events.

Financial analyses conducted in conjunction with patient safety reports illuminate the substantial economic burden associated with medical errors. In the United States alone,

an estimated \$38 million annually is attributed to patient-related errors, with a significant portion deemed avoidable. These findings underscore the imperative for robust safety protocols to minimize the financial toll on individuals, healthcare facilities, and society at large.

While global initiatives have made significant strides in advancing patient safety, regional disparities persist, hindering comprehensive data collection and analysis. In India, for instance, the extent of patient harm remains largely undocumented, reflecting broader challenges in data transparency and healthcare infrastructure. Nevertheless, initiatives spearheaded by organizations like NATHEALTH and the National Accreditation Board for Hospitals (NABH) demonstrate a concerted effort to address medication safety and raise awareness about patient safety imperatives.

As we navigate the complexities of healthcare delivery, it is essential to recognize that hospitals, while vital for treatment, harbor inherent risks that demand vigilant oversight and proactive interventions. By fostering a culture of transparency, accountability, and continuous improvement, stakeholders can collectively strive towards safer healthcare environments that prioritize patient well-being above all else.

Keynote Address

Advancing Patient Safety: A Collective Effort



Mr. Jaxay Shah

Chairperson, Quality Council of India

The collaborative efforts of NATHEALTH, Praxis Global, and NABH have resulted in a groundbreaking publication on patient safety, marking a significant milestone in the ongoing endeavor to ensure the well-being and safety of patients within the healthcare system. Over the years, a combination of collaborative initiatives has propelled us forward in this collective journey.

QCI has played a pivotal role in establishing benchmarks, promoting continuous improvement, and cultivating a culture of excellence within the healthcare ecosystem. NABH's commitment to upholding the highest standards of patient safety and quality healthcare has been instrumental in driving positive change. Through rigorous accreditation processes and quality improvement initiatives, the healthcare sector has embraced a patient-centric approach, resulting in improved outcomes and enhanced credibility.

Achieving patient safety requires concerted action from various stakeholders, including healthcare workers, hospitals, industry organizations, and policymakers. By leveraging our collective expertise, we can drive transformative change and uphold the principles of patient safety and quality healthcare.

Looking ahead to 2047, the vision for a developed and prosperous Bharat hinges on the foundation of quality healthcare. In the coming decade, it is imperative to harness technology and existing capacities to establish an integrated healthcare delivery system that prioritizes comprehensive care for all individuals, irrespective of their geographical or socio-economic background.

Patient safety transcends mere regulatory compliance; it embodies a commitment to vigilance, continuous improvement, and delivering the highest quality care. As partners in this endeavor, we must remain steadfast in our dedication to fulfilling this promise to every individual seeking healing within our healthcare systems.

Whitepaper Presentation: Forging a Safer Future



Mr. Aryaman Tandon
*Managing Partner and Co-founder,
Praxis Global Alliance*

Advancing Patient Safety: A Comprehensive Approach

In enhancing healthcare outcomes, the imperative of patient safety emerges as a cornerstone. Amidst the time constraints of pre-lunch sessions, a concise yet impactful discussion was warranted.

As a global management consulting firm with a significant presence across the APAC region, Praxis Global Alliance recognizes the criticality of patient safety in the broader healthcare landscape. This realization stems from insightful conversations and observations, highlighting the persistent challenges in achieving high-quality healthcare outcomes in India.

Rationale for Patient Safety: The significance of patient safety becomes evident when considering its correlation with overall health prosperity and economic growth. Countries with robust healthcare systems characterized by high levels of patient safety tend to exhibit superior health outcomes and financial resilience.

Defining Patient Safety: From the perspective of the whitepaper, patient safety encompasses six dimensions, including surgeries, childbirth, blood and injection-related procedures, medication safety, and medical devices. Each dimension represents critical areas where safety protocols are paramount to prevent harm.

Addressing Challenges: India faces significant challenges in various healthcare indicators related to patient safety, such as mortality rates, medical errors, and treatable mortality. Despite the strides made in healthcare infrastructure and technology adoption, these challenges persist, necessitating focused interventions.



Release of Knowledge Paper 'Forging a Safer Future'

Insights from Research

The approach to addressing patient safety involved extensive research, consultations with stakeholders, and a review of global best practices. Insights gleaned from over 1200 participants across the healthcare spectrum informed the development of our whitepaper.

Key Themes and Recommendations

Four major themes emerged as barriers to patient safety: mindset, staffing, patient awareness, and digital adoption. Each theme underscores the need for a shift in perspective, adequate staffing levels, improved patient education, and enhanced data-driven incident reporting mechanisms.

Policy and Regulatory Interventions

The whitepaper outlined policy recommendations aimed at creating an enabling environment for patient safety. This includes reforms to regulatory frameworks, resource allocation for regulatory bodies, and initiatives to empower patient advocacy groups.

Harnessing Technology and Data

Technology and data play pivotal roles in driving patient safety initiatives. Recommendations focused on leveraging digital solutions for incident reporting, information sharing, and provider empowerment to enhance safety outcomes.

Collaborative Efforts and Leadership

Achieving meaningful progress in patient safety requires collaborative leadership and a collective commitment from all stakeholders. This entails developing a skilled workforce, fostering a culture of safety, and implementing interventions outlined in the whitepaper.

In conclusion, the whitepaper represents a culmination of efforts aimed at addressing the multifaceted challenges of patient safety in India's healthcare ecosystem. While it serves as a framework for action, the real work lies in its implementation. They extend their gratitude to all contributors and stakeholders and emphasize the importance of sustained collaboration to realize the vision of safer healthcare for all.

Patient Safety

Panel Discussion: Patient Safety Imperative: Charting India's roadmap for transformative change.

Moderator: Dr. Narottam Puri, Advisor (Medical), Fortis Healthcare, Principal Advisor, QCI, Advisor— FICCI Health Services and MVT

Experts:

- Dr. Atul Mohan Kochhar (Session Chair), Chief Executive Officer, NABH National Accreditation Board for Hospitals & Healthcare Providers
- Dr. J N Srivastava, Advisor, Quality Patient Safety Division, NHSRC
- Dr. Sumana Arora, Senior Consultant (Health), NITI Aayog, Government of India
- Mr. Pranav Sharma, Cluster Head (India, Singapore and Malaysia), Baxter India Private Limited
- Mr. Raju Narayan, Global Sector Specialist: Health IFC - International Finance Corporation



Experts during the panel discussion

Advancing Patient Safety: Insights from Healthcare Leaders



Dr. Atul Mohan Kochhar

Chief Executive Officer, NABH National Accreditation Board for Hospitals & Healthcare Providers

The discourse on patient safety is essential in India's evolving healthcare landscape. Over the past few years, substantial investments have been made by both government and private sectors in healthcare infrastructure and services. However, the critical question arises: Are these investments translating into the desired outcomes for the nation as a whole?

Assessing Progress

India has made commendable progress in indicators such as maternal and infant mortality rates. Yet, a pressing need remains to ensure that these achievements are sustained and expanded upon. The focus has shifted towards integrating safety as a fundamental component of healthcare quality, as highlighted by the National Health Systems Resource Centre (NHSRC).

Government Initiatives

The government's efforts, such as the National Patient Safety Implementation Framework introduced in 2018, demonstrate a commitment to addressing patient safety challenges. However, the real challenge lies in implementing these frameworks effectively at the grassroots level, particularly in district hospitals and primary healthcare facilities.

Magnitude of the Problem

The scale of patient safety issues in India is significant, with an estimated 52 lakh patients experiencing harm annually. This affects healthcare outcomes and places a considerable financial burden, with 15-20% of hospital budgets allocated to addressing patient safety-related issues.

Current Interventions

Several interventions have been implemented to improve patient safety, including initiatives like Laksh for maternity care and Muscon for pediatric services—additionally, the Sakushal self-assessment tool addresses low-hanging fruit in infection control and other safety-related issues.



Dr. J N Srivastava

Advisor, Quality Patient Safety Division, NHSRC



Mr. Pranav Sharma

*Cluster Head (India, Singapore and Malaysia),
Baxter India Private Limited*

Industry Perspectives

The pharmaceutical and medical technology sectors are crucial in enhancing patient safety. Industry leaders emphasize a shift towards proactive approaches, focusing on training, awareness, innovation, and health economic data.

Training and Awareness

Collaborations between industry and healthcare providers have led to programs like IV safety training and patient awareness campaigns. These initiatives aim to equip healthcare professionals and patients with the knowledge and tools to prevent errors.

Innovation and Technology

Digital innovations, such as predictive maintenance for medical equipment, offer promising solutions to reduce errors and improve patient safety. Industry partnerships with healthcare facilities and policymakers can drive the adoption of such technologies.

Regulatory Framework

Accreditation standards, such as those provided by the National Accreditation Board for Hospitals & Healthcare Providers (NABH), serve as a cornerstone for ensuring patient safety. Accreditation emphasizes quality protocols and encourages continuous improvement in healthcare delivery.

Role of Accreditation

NABH's accreditation standards incorporate patient safety measures across various domains, including infection control, medication management, and facility safety. These standards provide a framework for hospitals to enhance safety practices and mitigate risks.

Digital Health and Accreditation

NABH's efforts to incorporate digital health standards aim to leverage technology to improve healthcare delivery and patient safety. Digitalization initiatives, supported by industry collaborations, have the potential to reach primary healthcare facilities and strengthen the healthcare system.

Financial Implications

From a financing perspective, the cost of errors in healthcare far outweighs the initial



Mr. Raju Narayan

Global Sector Specialist, Health IFC - International Finance Corporation



Dr. Sumana Arora

Senior Consultant (Health), NITI Aayog, Government of India

investments required for patient safety initiatives. The International Finance Corporation (IFC) recognizes the importance of patient safety in ensuring the sustainability and effectiveness of healthcare systems.

Integrating Safety into Investment Assessments

The emphasis on patient safety in healthcare financing and investment is crucial for ensuring quality care delivery. Developmental finance organizations, such as the International Finance Corporation (IFC), prioritize patient safety as an integral part of their due diligence process when funding healthcare facilities or organizations. This approach ensures that the funding is utilized effectively, focusing on improving patient outcomes and reducing harm.

Global Challenges and Solutions

The need for patient safety is universal and extends across all healthcare systems, whether in India, Africa, Latin America, or elsewhere. Safety and quality are not just checkboxes but must become ingrained in the culture of healthcare delivery. Everyone involved in the patient's journey, from clinicians to housekeepers, plays a role in maintaining a safe environment.

Overcoming Financial Constraints

Many healthcare providers, particularly smaller facilities, often cite financial constraints for neglecting safety and quality measures. However, ensuring patient safety does not necessarily require significant financial investment. Simple measures like proper patient identification can significantly enhance safety without incurring substantial costs. Additionally, technology can provide tools to support safety efforts efficiently.

Collaboration for Collective Responsibility

Ensuring patient safety is a collective responsibility involving regulators, accreditation bodies, healthcare providers, insurers, and patients. Each entity has a role in promoting a culture of safety and accountability within the healthcare ecosystem. By working together, stakeholders can create a safer environment for patients and healthcare providers.

Cultivating a Culture of Safety

Building a culture of safety requires continuous effort and commitment from all stakeholders. Encouraging incident reporting, fostering a mindset of accountability, and promoting best practices are essential steps toward creating a safer healthcare environment. It must become a way of life ingrained in every aspect of healthcare delivery, from hospitals to primary and home care settings.

The integration of patient safety into healthcare financing and investment is crucial for improving outcomes and reducing harm. Developmental finance organizations like the IFC prioritize patient safety in their due diligence processes, assessing investments based on their potential to enhance safety and quality within healthcare facilities. Ensuring patient safety is a global challenge that requires collaboration among stakeholders, and financial constraints should not hinder efforts to prioritize it. Creating a culture of safety involves fostering accountability, promoting incident reporting, and encouraging best practices across all levels of healthcare delivery. By working together, stakeholders can create a safer healthcare environment for patients and providers alike.

Key Takeaways

- Implement National Patient Safety Implementation Framework effectively at the grassroots level to address patient safety challenges.
- Increase training programs for healthcare professionals and patients, focusing on initiatives like IV safety training and patient awareness campaigns.
- Emphasize the role of pharmaceutical and medical technology sectors in enhancing patient safety through proactive approaches.
- Leverage innovations like predictive maintenance for medical equipment, to reduce errors and improve patient safety, fostering partnerships.
- Strengthen accreditation standards, such as those provided by NABH, to incorporate patient safety measures across various domains.
- Integrate digital health standards into accreditation frameworks, extending these initiatives to primary healthcare facilities.
- Prioritize patient safety in healthcare financing and investment assessments, ensuring that funding is utilized effectively to reduce harm.
- Overcome financial constraints by implementing simple, cost-effective measures, such as proper patient identification, and leveraging technology.
- Encourage incident reporting, promoting accountability, and sharing best practices across all levels, from hospitals to primary and home care settings.
- Create a safer healthcare environment with collaboration among regulators, accreditation bodies, healthcare providers, insurers, and patients.

Fireside Chat: Health, Climate & Sustainability

Fireside Chat: Health, Climate & Sustainability

Moderator: Mr. Himanshu Sikka, Chief Strategy and Diversification Officer, IPE Global

Experts:

- Mr. Sanjiv Navangul, Managing Director & Chief Executive Officer, Bharat Serum & Vaccines Limited
- Dr. Neeta Rao, Senior Health Lead, USAID
- Dr. K Madan Gopal, Advisor, NHSRC
- Ms. Shivani Sahai, Head, Impact & ESG, Quadria Capital
- Mr. Piyush Jain, Co-founder & CEO, Carepal Group and Impact Group



Experts during the panel discussion

Fireside Chat: Health, Climate & Sustainability



Mr. Sanjiv Navangul
MD & CEO, Bharat Serum & Vaccines Limited



Dr. Neeta Rao
Senior Health Lead, USAID

The discourse on the relationship between climate and health has gained significant attention in recent years, reflecting the growing recognition of the impact of environmental factors on public well-being. While the challenge has existed for decades, it has garnered increased prominence in the last few years, prompting discussions on addressing it effectively.

Assessing the Challenges

Climate change poses multifaceted challenges to public health, affecting factors such as air and water quality, temperature, and disease prevalence. For instance, rising temperatures lead to increased vector density, as witnessed in the proliferation of mosquitoes in areas like Delhi. Additionally, extreme weather events, such as flooding, can impact access to clean water and exacerbate health risks.

Government Strategies

The government has recognized the importance of addressing climate-related health challenges and has implemented various initiatives to mitigate their impact. The National Action Plan for Climate Change outlines strategies for building resilience and adapting healthcare systems to climate change. Programs like the National Health Mission (NHM) support capacity building to address climate-induced diseases and promote climate-resilient infrastructure.

Healthcare Industry Response

The healthcare sector itself contributes to environmental pollution, with hospitals, pharmaceuticals, and supply chains accounting for a significant share of CO2 emissions. Industry leaders increasingly adopt sustainable practices, such as investing in solar power and recycling, to minimize their environmental footprint. Moreover, research and development efforts address emerging health threats like air pollution-related diseases and antibiotic-resistant infections.

Investor Perspective

Investors recognize the interconnectedness of climate and health and are integrating



Dr. K Madan Gopal
Advisor, NHSRC



Ms. Shivani Sahai
Head, Impact & ESG, Quadria Capital

climate considerations into their investment strategies. Funds like Quadria Capital prioritize investments that promote climate resilience and sustainability, recognizing the long-term societal and economic benefits of addressing climate-related health issues.

Philanthropic Contributions

Philanthropic organizations, including USAID, are crucial in addressing climate-related health challenges. Initiatives like Sustainable Action for Climate Health aim to mobilize resources and support community-level solutions to mitigate climate impacts on health. Philanthropists provide catalytic funding to de-risk investments in climate-resilient healthcare infrastructure and technologies.

Impact on Healthcare Financing

Climate change, particularly air and water pollution, contributes to the increasing incidence of diseases like cancer, placing a financial burden on individuals and healthcare systems. Crowdfunding platforms and zero-interest loans help bridge the financing gap for patients facing high treatment costs. However, long-term solutions require proactive measures to address environmental impacts on health and ensure affordability and accessibility of healthcare services.

Government's Long-Term Approach

The government acknowledges the need for a comprehensive and proactive approach to address climate-related health challenges. While current efforts focus on reactive measures, such as building resilience to extreme weather events and improving air quality monitoring, there is a growing recognition of the importance of longitudinal studies to assess the long-term environmental impact of infrastructure projects and policy interventions.

Industry Response to Challenges

The challenge of addressing unknown impacts and limited literature in various areas has prompted industries to invest in research and development (R&D) to find solutions. This includes both proactive and reactive approaches to tackle emerging issues.

Declining Fertility Rates and Societal Impact

One significant impact observed is the global decline in fertility rates, leading to decreased working-age populations and various societal challenges. For instance, Italy experienced a quarter where no births were recorded, indicating a pressing issue with fertility rates.

Mr. Piyush Jain
*Co-founder & CEO, Carepal Group and
Impact Group*



Addressing Fertility Issues

Efforts have been made to address fertility issues through the development of safer and more effective hormone treatments. These treatments aim to be less interventionist and dependent on natural resources, integrating technology to provide better solutions.

Promotion of Women's Health and Sports

Initiatives like promoting women's sports have been undertaken to address preventive aspects. As a leading women's health company, efforts have been made to support women athletes and encourage healthy lifestyles among women.

Multi-Angled Approach to Healthcare

Recognizing the complexity of challenges, a multi-angled approach is necessary, involving R&D alongside preventive measures. This comprehensive approach aims to address various aspects of healthcare challenges effectively.

Role of Philanthropy and Donors

Philanthropic organizations play a crucial role in incentivizing private sector involvement that is aligned with government priorities. Collaboration between philanthropists, the private sector, and the government is essential to mobilize resources for impactful solutions.

Need for Private Sector Investment

Meeting net-zero targets and addressing healthcare challenges require significant private-sector investment. Philanthropists can play a key role in making initiatives conducive to community needs and mobilizing resources for high-impact solutions.

Innovative Financing Models

Models like blended financing, innovation funds, and infrastructure bonds are being explored to mobilize private capital for climate-friendly solutions and healthcare infrastructure.

Stakeholder Collaboration and Scalability

Engaging stakeholders across sectors and aligning with government programs are crucial for the scalability and effectiveness of solutions. Collaboration ensures solutions are tailored to community needs and supported by evidence-based research.

Community-Centric Approach

Empowering communities and making initiatives community-driven is essential for success. Community participation enhances understanding and ensures that programs become movements rather than isolated efforts.

Driving Players for Program Implementation

Local programs require a driving force to ensure effective implementation. This involves creating synergies between government departments, community leaders, and other stakeholders to make initiatives community-driven.

Collective Responsibility and Action

Addressing challenges like climate change and healthcare requires collective responsibility and action. It's not about individual champions but about empowering communities and fostering collaborative efforts.

The climate-health nexus presents complex challenges that require collaboration across sectors and proactive strategies to mitigate risks and promote resilience. By integrating climate considerations into healthcare policies, investments, and practices, stakeholders can work towards creating a sustainable and resilient healthcare system that safeguards public health in the face of environmental changes.

Key Takeaways

- Implement government initiatives like the National Action Plan for Climate Change effectively, focusing on building resilience and adapting healthcare systems to climate change, particularly at the grassroots level.
- Encourage sustainable practices in the healthcare industry, such as investing in renewable energy and recycling.
- Integrate climate considerations into investment strategies, prioritizing funds that promote climate resilience, sustainability and economic benefits.
- Mobilize philanthropic contributions to support community-level solutions and de-risk investments in climate-resilient healthcare infrastructure.
- Bridge the financing gap for patients facing high treatment costs due to climate-related diseases through crowdfunding platforms and zero-interest loans.
- Address climate-related health challenges, including longitudinal studies to assess the impact of infrastructure projects and policy interventions.
- Invest in research and development (R&D) for emerging challenges, including declining fertility rates, safer and more effective treatments.
- Promote preventive measures such as women's sports to encourage healthy lifestyles and address fertility issues, integrating technology for better solutions.
- Explore innovative financing models like blended financing and infrastructure bonds to mobilize private capital for climate-friendly solutions.
- Foster stakeholder collaboration and scalability with government programs, and ensuring community-driven and evidence-based initiatives.

NATHEALTH Impact Awards 2024

Knowledge Partners
Plenary Session



Introduction

Driving Impact: NATHEALTH Foundation and Impact Awards



Mr. Ashwajit Singh
*Chair North Region - NATHEALTH
Founder & Managing Director IPE Global*

NATHEALTH Foundation Initiative: Before discussing the NATHEALTH Impact Awards, it's essential to highlight NATHEALTH's new initiative - the NATHEALTH Foundation. This initiative aimed to establish a credible platform for corporates and donors to invest in impactful CSR initiatives, particularly in healthcare. The foundation's strategy focused on providing quality, accessible, and affordable healthcare to all, extending to climate and other health-related initiatives.

Collaborative Efforts for Impact: NATHEALTH recognized the significance of collaboration among various stakeholders in the healthcare sector, including pharmaceutical companies, diagnostic chains, hospitals, and other service providers. By pooling resources and expertise through CSR spending, NATHEALTH aimed to amplify the impact of initiatives beyond individual contributions.

Leadership and Support: Under the leadership of Sunil Thakur, the NATHEALTH Foundation was established, with dedicated individuals like Jaya leading the CSR efforts. The foundation received its initial funding from Premji, marking the beginning of impactful CSR programs.

NATHEALTH Impact Awards: This year's NATHEALTH Impact Awards expanded beyond the health sector to include areas around health, notably climate impact. The awards aimed to recognize and facilitate innovators who demonstrated commitment, passion, and creativity in making positive changes on the ground.

Award Categories and Selection Process: Unlike previous years, this edition featured four thematic areas: patient safety, health innovation, health and climate, and traditional corporate social responsibility. A distinguished jury, comprising experts from various fields, evaluated submissions based on criteria such as innovation, impact, equity, inclusiveness, sustainability, scalability, and replicability.

The evaluation process involved three stages:

1. Application Submission: IP Global, as the knowledge partner, collaborated with

NATHEALTH to define criteria and invited submissions. A total of 74 applications were received, demonstrating the breadth of impactful work in the sector.

2. Shortlisting and Criteria Agreement: After reviewing submissions, the jury, in consultation with facilitators, agreed on the weightage for each criterion. Shortlisted applications underwent further scrutiny.

3. Interactive Presentations: Unlike previous years, shortlisted applicants presented their initiatives to the jury, fostering detailed discussions and evaluations. Final decisions were made based on these presentations.

The jury members, representing diverse expertise and backgrounds, played a crucial role in the evaluation process. Their dedication ensured that awards were given based on merit and impact rather than mere formalities.

The NATHEALTH Impact Awards and the establishment of the NATHEALTH Foundation signify a commitment to fostering positive change in healthcare and related sectors. Through collaboration, innovation, and rigorous evaluation, NATHEALTH aims to drive meaningful impact and improve healthcare accessibility and quality for all.

Jury Members

Patient Safety

- Dr. Narottam Puri, Advisor (Medical) Fortis Healthcare, Principal Advisor, QCI, Advisor- FICCI Health Services and MVT
- Dr. Pawan Kapoor, Vice Chairman, Rus Education Vice Chancellor Lincoln American University
- Dr. Manjunath Shankar, Head Strategic Initiatives & Lead Technical Team, PAHAL - Innovative Financing Platform (Supported by USAID)

CSR/ PSUs/ Corporates/ Foundation

- Ms. Roli Singh, Additional Secretary, MoHFW
- Dr. Shraavan Subramanyam, Past President, NATHEALTH and Advisor, Healthcare & Med-tech Investments-Premji Invest
- Mr. Ashwajit Singh, Chair North Region - NATHEALTH and Founder & Managing Director, IPE Global
- Mr. Devendra Khandait, Deputy Director, Bill & Melinda Gates Foundation Technical Team, PAHAL - Innovative Financing Platform (Supported by USAID)

Health & Innovation

- Dr. Shirshendu Mukherjee, Mission Director, PMU (DBT-BIRAC-BMGF-Wellcome Trust)
- Dr. Ranjan Kumar Choudhury, Advisor, Healthcare Technology, NHSRC
- Dr. Harsh Mahajan, Past President, NATHEALTH and Founder and Chief Radiologist, Mahajan Imaging
- Dr. Neeta Rao, Senior Health Lead, USAID

Health & Climate

- Dr. Dinesh Arora, Principal Health Specialist, ADB
- Mr. Himanshu Sikka, Project Director, PAHAL; Chief Strategy & Diversification Officer, IPE Global Limited
- Dr. K Madan Gopal, Advisor, NHSRC

NATHEALTH Impact Awards: A Glimpse



*Winner: Fall Reduction and Prevention Intervention by Medica Super Specialty Hospital, Ranchi, Jharkhand
Category: Patient Safety (Providers)*



*1st Runner up: Controlling the Rising Trend of Surgical Site Infection by Medica Super Specialty Hospital, Kolkata, West Bengal
Category: Patient Safety (Providers)*



*Winner: MedEngage Medical Outreach Program by Metropolis Healthcare Ltd.
Category: Corporate Social Responsibility (CSR)*



*1st Runners up: Adolescent Health Anemia Program by HCL Foundation
Category: Corporate Social Responsibility (CSR)*



*2nd Runners up: Action to Change Together by Siemens Healthineers
Category: Corporate Social Responsibility (CSR)*



*Special Award: Leprosy Elimination Action Programme (LEAP) by Bharat Serums and Vaccines (BSV)
Category: Corporate Social Responsibility (CSR)*



*Winner: Product SAANS by Innacel Technologies Private Limited
Category: Healthcare Innovation (Start-ups)*



*Winner: Prathmasense by Ramja Genosensor Private Limited
Category: Healthcare Innovation (Start-ups)*

NATHEALTH Impact Awards 2024: A Glimpse



1st Runner up: BCR-ABL qRT-PCR Kit by NeoDx Biotech Labs Private Ltd
Category: Healthcare Innovation (Start-ups)



Special Award: SPANDAN by Sunfox Technologies Private Limited
Category: Healthcare Innovation (Start-ups)



Winner: Revolutionizing Menstrual Hygiene in India (Project Baala)
Category: Sustainability (Health & Climate)



1st Runner up: Precision Refrigeration for Healthcare by Blackfrog Technologies Private Limited
Category: Sustainability (Health & Climate)



NATHEALTH Impact Awards Jury Members



NATHEALTH Impact Award Winners

Concluding Session: Bringing in the Summit Deliberations & Charting an Action Plan for Arogya Bharat

Session Moderators

- Mr. Ashish Yadav, Partner, Kearney
- Ms. Barathi Srinivasan, Partner, Kearney

Speakers

- Ms. Mr. Sanjeev Vashishta, Managing Director, PathKind Diagnostics (P) Ltd.
- Ms. Nanki Lakhwinder Singh, Managing Director, ProTribe Services India Pvt Ltd
- Mr. Suyash Borar, Director, Xceptional Health & Wellness Pvt. Ltd.
- Mr. Vivek Srivastava, Founder & Chief Executive Officer, HCAH India
- Mr. Vivek Kwatra, Product Head, Healthcare and Education Finance, HDFC Bank
- Dr. Rajeev Sharma, Vice President. TATA 1mg
- Dr. Bhupendra Kumar Rana, Founding CEO, Quality & Accreditation Institute (QAI)
- Mr. Dharmil Sheth, Co-founder & Whole time Director, API Holdings Limited



Experts during the concluding session

Concluding Session: Bringing in the Summit Deliberations & Charting an Action Plan for Arogya Bharat



The concluding session of the 10th Annual Summit centered around Arogya Bharat 2024 and provided valuable insights into various facets of healthcare, featuring a diverse range of speakers and discussions. Here's a recap of the key highlights from the sessions held over the last two days:

Synthesizing Power-Packed Sessions

The summit witnessed multiple sessions and discussions covering various ecosystem players, including healthcare, diagnostics, medtech, and more. The aim was to synthesize these sessions and identify clear action items for the industry in the short and long term.

Investment and Infrastructure

The summit began with a focus on investments and public-private partnerships for healthcare infrastructure. Discussions revolved around increasing private investments with public support, mainly targeting healthcare access in Tier 2, Tier 3, and rural locations.

Medical Devices and Technology

An essential aspect addressed was the role of medical devices and technology in healthcare. Discussions highlighted market growth, regulatory challenges, and India's advancements in innovation, including engaging presentations reminiscent of Shark Tank-style startups.

Allied Healthcare Professionals

The summit also addressed the importance of allied healthcare professionals in contributing to the sector's growth. Deliberations emphasized the need for quality care beyond infrastructure and investment.

Digital Solutions and Interoperability

Participants discussed digital solutions and innovation, focusing on their availability, interoperability, and user perceptions. The integration of platforms and data sharing were highlighted as crucial for effective healthcare delivery.



Patient Safety and Sustainability

Sessions delved into patient safety, common guidelines, and healthcare's contribution to sustainability and climate change. These discussions underscored the importance of ensuring quality care while addressing broader societal and environmental challenges.

Geriatric Care and Out-of-Hospital Solutions

The summit underscored the urgent need for comprehensive geriatric care and the potential of out-of-hospital solutions to alleviate pressure on healthcare infrastructure. Short-term rehabilitation and awareness campaigns were highlighted as key priorities.

Technological Innovations and Interoperability

Focus on technological innovations, particularly those enhancing interoperability and data sharing, emerged as critical for advancing healthcare delivery. Stakeholder collaboration and government support are essential to drive these initiatives forward.

The 10th Annual Summit provided valuable insights into the challenges and opportunities facing the healthcare industry, with a focus on geriatric care, out-of-hospital solutions, and technological advancements. Stakeholders must continue to collaborate and innovate to ensure quality care, patient safety, and sustainable healthcare practices.

Vote of Thanks



Ms. Vrinda Chaturvedi
National Lead, NATHEALTH

The summit successfully completed two insightful days of discussions aiming to strengthen the healthcare system of India. As the 10th Arogya Bharat Summit came to a close, NATHEALTH thanked the eminent dignitaries from the government, especially the Department of Pharmaceuticals, NHSRC, NITI Aayog, Government e-Marketplace, NABH, QCI, EPIHC (Ethical Principles in Healthcare), KOITA Foundation, Empower School of Health, Leadership Team, Governing Council, Past Presidents, Secretariat Team, Regional Leads, eminent speakers, delegates, and the audience.

NATHEALTH extended thanks to the event's Platinum Sponsors, Gold Sponsors, Silver Sponsors, Bronze Sponsors, Session Sponsors, Other Sponsors, Knowledge Partners, and the event's Execution Partners. Special thanks was given to NATHEALTH's bankers and resource mobilizers.

NATHEALTH expressed its gratitude for everyone who came together, and worked hand in hand to make the event memorable.

NATHEALTH will see you at the next Summit in 2025 - for a Arogya and Viksit Bharat.

NATHEALTH Thanks its Government Dignitaries



*Mr. J. Satyanarayana
Chief Advisor, C4IR India, World Economic Forum
and Former Chairman, UIDAI*



*Mr. Arunish Chawla
Secretary, Department of Pharmaceuticals, Ministry of
Chemicals and Fertilizers Government of India*



*Mr. Jaxay Shah
Chairperson, Quality Council of India*



*Dr. Atul Mohan Kochhar
Chief Executive Officer, NABH National Accreditation Board for
Hospitals & Healthcare Providers, Quality Council of India*



*Dr. Sumana Arora
Senior Consultant (Health) NITI Aayog, GoI*



*Dr. J N Srivastava
Advisor, Quality Patient Safety Division, NHSRC*



*Dr. Ranjan Kumar Choudhury
Advisor, Healthcare Technology, National Health Systems
Resource Centre, Ministry of Health & Family Welfare, GoI*



*Dr. K Madan Gopal
Advisor, NHSRC*



*Mr. Arpit Bajpai
Director, Category Management Health,
Government e Marketplace (GeM), Government of India*

Event at a Glance



Event at a Glance



Event at a Glance



Event at a Glance



We thank our Sponsors & Partners

Platinum Sponsors



Gold Sponsors



Silver Sponsors



Bronze Sponsors



Session Sponsors



Other Sponsors



Knowledge Partners



Execution Partners



10th NATHEALTH[®]
Healthcare Federation of India

**ANNUAL
AROGYA BHARAT
SUMMIT 2024**



21st & 22nd March 2024 | The Lalit, New Delhi

Post Event Report
Healthcare Federation of India (NATHEALTH)

Report written, compiled, edited & designed by
Health Biz Insight