Healthcare Sector Profile
Highlights

National Health Policy 2017 formulated to address the current & emerging challenges based on changing socio-economic & epidemiological landscape

Indian healthcare sector is expected to reach US$ 280 billion and rank amongst the top 3 healthcare markets in terms of incremental growth by 2020

In FY17, Indian healthcare sector stood as the 4th largest employer with a total of 319,780 people employed

Government of India aims to increase the total health expenditure to 2.5% of Gross Domestic Product (GDP) by 2025 from the current 1.15%

FDI inflows in hospitals and diagnostic centers during April 2000 - December 2017 accounted for US$ 5 billion with a share of 1.36% of total FDI inflows in India

38 Joint Commission International (JCI) accredited hospitals and 680 National Accreditation Board for Hospitals & Healthcare Providers (NABH) accredited hospitals

Advantage India

Skilled healthcare workforce
Pool of specialist doctors and availability of quality healthcare workforce

Access to latest technology
Indian healthcare sector has pioneered in fields like robotic surgery and cardiovascular surgeries

Cost advantage
30-70% lower cost of complex surgeries as compared to developed nations

World class healthcare infrastructure
Well known premier hospitals with international accreditations catering to international patients

Sources: “NABH Accredited Hospitals”, NABH website, accessed 31 May 2018; “JCI-Accredited Organizations”, JCI website, accessed 31 May 2018
Sector Scenario

The total healthcare sector is expected to touch US$ 280 billion by 2020 growing at CAGR 15%

The hospital segment in India stood at US$ 61.79 billion in 2017 and is expected to increase at a CAGR of 16-17% to reach US$ 132.84 billion by 2023

The Healthcare Information Technology (IT) market is valued at US$ 1 billion (April 2016) and is expected to grow 1.5 times by 2020

Telemedicine market in India is expected to rise at a CAGR of 20% during FY16-20, reaching to US$ 32 million by 2020

The home healthcare market is estimated to reach US$ 4.46 billion by the end of 2018 and US$ 6.21 billion by 2020

Health insurance is gaining momentum in India; witnessing. Gross healthcare insurance premium in the month of September 2017 stood at US$ 2.7 billion

Source: Frost & Sullivan, LSI Financial Services, TechSci Research
Notes: E – Expected, F - Forecasted
Healthcare Spend – India and Global

- Total spending on healthcare is anticipated to reach about 6% of GDP by 2025, with out-of-pocket spending at less than 30%.
- Public spending on healthcare to account for ~50% of overall health expenditure, driven by greater government prioritization of healthcare.

Source: World Bank Data Bank - 2014
Developing Infrastructure

Hospital beds that are required to meet WHO guideline of 3.5 beds per 1000 people

- Bed Capacity (2015) at 1.1 beds per 1000: 1.5 million
- Required to meet WHO guidelines of 3.5 beds per 1000: 3.2 million
- Desired Bed Capacity: 5.1 million

Doctors required to meet WHO guideline of 14 per 10,000 population

- (2015): 3 million
- Required: 6 million
- World Average: 3 million

Number of primary health centers (PHCs) increased to 32,569 and number of sub centers reached to 167,616 as of May 2018

Source: Ministry of Health & Family Welfare, Government of India
More Beds, More Facilities, More Hospitals and More Doctors

20 new super specialty AIIMS - like Hospitals being set up

1675 hospital beds added in the functional AIIMS

India plans to create 1 million skilled healthcare providers by 2022

US$ 200 billion is expected to be spent on medical infrastructure by 2024

Total 92 medical colleges, resulted increase in 15,354 MBBS seats

Total 12,646 PG seats have been increased

Government of India has allocated US$ 185.36 million towards the National Health Policy 2017 under which 150,000 health and wellness centers will be established

Source: Ministry of Health & Family Welfare, Government of India
Medical Tourism: A new growth factor

- As of April 2017, medical tourism market in India is US$ 3 billion in size and is expected to reach US$ 6 billion by 2018
- Treatment for major surgeries in India costs approximately 20% of that in developed countries
- The number of foreign tourists coming to India for medical purposes rose by almost 50% in 2016
  - The number of foreign tourist arrivals (FTA’s) during January 2018 were 10.66 lakh which accounted for 8.4% growth of FTA’s compared to January 2017
- The Ministry of AYUSH, Government of India has been implementing various initiatives to promote Ayurveda, Yoga and other AYUSH systems of medicine on an international level and was allocated Rs. 15.28 crore (US$ 2.36 million) in 2017-18 for this purpose

Sources: IBEF Healthcare Industry Analysis – May 2018
**Competitive landscape**

### Key private players

- **Fortis Healthcare**
  - 10,000 Beds

- **Apollo Hospitals**
  - 9,215 Beds

- **Narayana Health**
  - 7,500 Beds

- **Manipal Health Systems**
  - 4,900 Beds

- **Arvind Eye Care Systems**
  - 4,000 Beds

- **Care Hospital**
  - 2,400 Beds

### FDI Facts

- FDI inflows in hospitals and diagnostic centers during April 2000 - December 2017 accounted for US$ 5 billion with a share of 1.36% of total FDI inflows.
- 100% FDI is allowed in greenfield projects under the automatic route and in brownfield projects through government route.
- 100% FDI is allowed in construction of hospitals under the automatic route.

### Recent Investments

- DM Aster Group Plans to invest US$ 59.6 mn in Chennai to launch a 500 bed multi-specialty hospital.
- Metropolis Health Services Group plans to invest US$ 14.89 mn to open 30 labs and 700 collection centers.
- Nova Medical centers recently opened state of the art centers in Lucknow and plans to add 20 more centers in India, in partnership with IVI of Spain.

Government Initiatives: Policies and Schemes
The National Health Mission (NHM) through its sub-mission’s - the National Urban Health Mission (NUHM) and the National Rural Health Mission (NRHM) endeavors to provide effective and affordable healthcare to both the urban and rural citizens throughout the country and to improve the overall public health indicators, by focusing on infrastructure, quality, efficiency and responsiveness in the healthcare sector.

The National Health Mission seeks to ensure the achievement of the following indicators.

1. Reduce Maternal Mortality Ratio (MMR) to 1/1000 live births
2. Reduce Infant Mortality Rate (IMR) to 25/1000 live births
3. Reduce Total Fertility Rate (TFR) to 2.1
4. Prevention and reduction of anemia in women aged 15–49 years
5. Prevent and reduce mortality & morbidity from communicable, non-communicable; injuries and emerging diseases
6. Reduce household out-of-pocket expenditure on total health care expenditure
7. Reduce annual incidence and mortality from Tuberculosis by half
8. Reduce prevalence of Leprosy to <1/10000 population and incidence to zero in all districts
9. Annual Malaria Incidence to be <1/1000
10. Less than 1 per cent microfilaria prevalence in all districts
11. Kala-azar Elimination by 2015, <1 case per 10000 population in all blocks

In March 2018, the Union Cabinet of India approved the continuation of National Health Mission with a budget of Rs. 85,217 crore (US$ 13.16 billion) from 1st April 2017 to 31st March 2020

Source: Ministry of Health & Family Welfare, Government of India
Ayushman Bharat: World’s Largest Healthcare Initiative

Key Points
- Increased benefit cover to nearly 40% of the population, (the poorest & the vulnerable)
- Covers almost all secondary and many tertiary hospitalizations (except a negative list)
- Beneficiaries can visit any public or private (empaneled) hospital for treatment
- Cashless treatment facilities for patients
- Government has allocated Rs. 1200 crore towards National Health Protection Mission

Ayushman Bharat – National Health Protection Mission will subsume the on-going centrally sponsored schemes - Rashtriya Swasthya Bima Yojana (RSBY) and the Senior Citizen Health Insurance Scheme (SCHIS)

Provide comprehensive Health Coverage of up to 5 lakh per family per year to around 50 crore people

1.5 lakh Sub Centers & Primary Health Centers being transformed as Health & Wellness Centers (HWCs) to provide Comprehensive Primary Healthcare services

- In Gujarat, 1600 Health and Wellness Centres have been opened this year and 11,000 more have been planned for implementing Mukhyamantri Amrutam, Mukhyamantri Vatsalya, PMRSSM, etc.
- A total 44.85 lakh (Rural 28.28 lakh and Urban 16.56 lakh) families have been covered under this scheme in Gujarat

Source: Ministry of Health & Family Welfare, Government of India
## National Health Programmes (1/3)

<table>
<thead>
<tr>
<th>Janani Suraksha Yojana</th>
<th>Janani Shishu Suraksha Karyakram</th>
<th>Pradhan Mantri Surakshit Matritva Abhiyan (PMSMA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The scheme previously known as maternity Benefit Scheme</td>
<td>• The initiative entitles all pregnant women and sick infants to have free services and no expense for delivery, including caesarean section at public health institutions</td>
<td>• Aim: To provide qualitative ante-natal services, especially for High Risk Pregnant Women.</td>
</tr>
<tr>
<td>• <strong>Aim:</strong> To ensure nutritional support through monetary support to the beneficiaries</td>
<td>• Free drug and consumable</td>
<td>• Private practicing obstetricians are also involved to provide volunteer services.</td>
</tr>
<tr>
<td>• Provision of Rs. 600 in Urban areas and Rs. 700 in rural areas to eligible beneficiaries</td>
<td>• Free blood transfusion services</td>
<td>• <strong>Fix Day approach:</strong> the ninth of every month</td>
</tr>
<tr>
<td>• The benefits are given though Direct Benefit Transfer system during third trimester of the pregnancy</td>
<td>• Free diet</td>
<td>• Specialist services</td>
</tr>
<tr>
<td></td>
<td>• Free referral transport</td>
<td>• All essential investigations including obstetric Ultrasoundography</td>
</tr>
</tbody>
</table>
### National Health Programmes (2/3)

#### Mission Indradhanush

- **Aim:** To ensure Full Immunization who are either unvaccinated, or are partially vaccinated
- The four phases of Mission Indradhanush has covered 528 districts across the Nation
- Under this 3.15 crore children have been vaccinated and 80.63 lakh pregnant women have been immunized

#### Intensified Mission Indradhanush (IMI)

- IMI has been launched by the Government of India to reach each and every child under two years of age and all those pregnant women who have been left uncovered under the routine immunization programme
- The special drive focuses on improving immunization coverage in select districts and cities to ensure full immunization to more than 90% by December 2018.
National Health Programmes (3/3)

<table>
<thead>
<tr>
<th>National Program for Healthcare of the Elderly</th>
<th>Pradhan Mantri Swasthya Suraksha Yojna (PMSSY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• To provide accessible, affordable, and high-quality long-term, comprehensive and dedicated care services to an Ageing population</td>
<td>• To improve regional imbalances in the availability of affordable/reliable tertiary healthcare services, use of ICT in health sector</td>
</tr>
<tr>
<td></td>
<td>• Constructing new and up-grading several existing medical institutions in different states in the country</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pradhan Mantri National Dialysis Programme</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The Pradhan Mantri National Dialysis Programme (PMNDP), which was rolled out in 2016, provides free dialysis care to the patients in district hospitals, in collaboration with private partners, through the PPP mode</td>
</tr>
<tr>
<td>• Support is being provided to all States to provide dialysis services in all district hospitals &amp; Public Health Facilities for free to poor, and subsidized services to all patients under NHM</td>
</tr>
<tr>
<td>• At present, this facility is available in 500 district hospitals and more than 2.3 lakh poor patients have availed the Centre’s free dialysis scheme in the last two years</td>
</tr>
</tbody>
</table>
The Ministry of AYUSH, Government of India has been implementing various initiatives to promote Ayurveda, Yoga and other AYUSH systems of medicine on an international level and was allocated 87.64 crore for in 2018-19

- **Upgrade the educational standards** of Indian Systems of Medicines and Homoeopathy colleges in the country
- **11** National institutions under AYUSH
- **Evolve Pharmacopoeial standards** for Indian Systems of Medicine and Homoeopathy drugs

- **Strengthen the existing research institutions**
- **Central Council for Research are-29 in Ayurveda, 6 in Siddha, 18 in Unani** and **26 in Homoeopathy**
- **Promotion, cultivation and regeneration of medicinal plants** used in the systems

Recognizing the universal appeal and huge participation in Yoga, the United Nations proclaimed 21 June as the International Day of Yoga

e-Health Initiatives

**National eHealth Authority (NeHA)**
- Envisioned as a regulatory and promotional organization to strategize eHealth adoption and set the standards, policies and legal framework for the health sector.

**Integrated Health Information Program (IHIP)**
- This programme intends to provide EHR to all the citizens of India and provide interoperability to existing EHR/EMRs on the Integrated Health Information Platform.

**Electronic Health Record Standards for India**
- EHR standards were first notified in September 2013 by the MoHFW and a revised version was later released on 31 December 2016 after taking feedback.

**mHealth**
- The government is working with organizations, both government and private, to provide intuitive and interactive modes of communication, treatment, data transmission, and retrieval to doctors/hospitals and patients using mobile apps and websites.
Other Government Initiatives

- Elimination of communicable diseases - action plans to eliminate Leprosy by 2018, Measles by 2020 and Tuberculosis by 2025
- 1054 essential medicines bought under Price Control regime giving consumer total benefit of more than Rs. 10,000 crore
- Prices of Cardiac Stents & Knee Implants reduced by 50% to 70%
- Affordable medicines with PM Bhartiya Janaushadhi Kendras. More than 3,000 stores, resulting in savings of over 50% to the common man
- AMRIT pharmacies provide drugs for cancer and Cardiovascular diseases along with cardiac implants at a discount of 60% to 90%
Gujarat Scenario
## Towards a Healthy Gujarat

Gujarat ranked 4th in terms of overall performance Index Score based on performance of health outcomes published by NITI Aayog in February 2018

<table>
<thead>
<tr>
<th></th>
<th>India</th>
<th>Gujarat</th>
<th>State target (By 2030)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infant Mortality Rate (SRS 2016)</td>
<td>34</td>
<td>30</td>
<td>6</td>
</tr>
<tr>
<td>Maternal Mortality Ratio (SRS 2014-16)</td>
<td>130</td>
<td>91</td>
<td>45</td>
</tr>
<tr>
<td>Life Expectancy at birth (2012-16)</td>
<td>68.7</td>
<td>69.5</td>
<td>77</td>
</tr>
<tr>
<td>Institutional Deliveries (%) (2015-16)</td>
<td>78.9</td>
<td>88.7</td>
<td>99.8</td>
</tr>
<tr>
<td>Full Immunization rate (%) (NFS 2015-16)</td>
<td>62</td>
<td>50.4</td>
<td>100</td>
</tr>
</tbody>
</table>

Dahod district in Gujarat has topped in ‘Aspirational Districts’ released by Niti Aayog in June 2018

Source: Niti Aayog, Government of India; http://niti.gov.in/state-statistics
## Gujarat Public Health Infrastructure

<table>
<thead>
<tr>
<th>Service</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Super Specialty Facility</td>
<td>3</td>
</tr>
<tr>
<td>District Hospitals</td>
<td>24</td>
</tr>
<tr>
<td>Sub-District Hospitals</td>
<td>36</td>
</tr>
<tr>
<td>Medical Colleges</td>
<td>22</td>
</tr>
<tr>
<td>Urban Health Centers</td>
<td>307</td>
</tr>
<tr>
<td>Mobile Health Units</td>
<td>118</td>
</tr>
<tr>
<td>Community Health Centers</td>
<td>363</td>
</tr>
<tr>
<td>Primary Health Centers</td>
<td>1468</td>
</tr>
<tr>
<td>Sub-Centers</td>
<td>9156</td>
</tr>
<tr>
<td>Grant-in-aid Hospitals</td>
<td>119</td>
</tr>
<tr>
<td>Grant in Aid Ayurveda Hospitals</td>
<td>2</td>
</tr>
<tr>
<td>Total Ayurveda Hospitals</td>
<td>41</td>
</tr>
<tr>
<td>Ayurvedic Dispensaries</td>
<td>559</td>
</tr>
<tr>
<td>Licensed Pharmacies</td>
<td>500</td>
</tr>
<tr>
<td>Homeopathy Hospitals</td>
<td>18</td>
</tr>
<tr>
<td>Homeopathy Dispensaries</td>
<td>219</td>
</tr>
</tbody>
</table>

Source: Department of Health & Family Welfare, Government of Gujarat
## Medical and Para Medical Colleges

### Total of 22 Institutions with 3480 seats
- 6 Government colleges (1080 seats)
- 7 Gujarat Medical Education & Research Society (GMERS) Medical Colleges (1050 seats)
- 3 Municipal Corporation College (550 seats)
- 1 Deemed University (150 Seats)

### Total of 13 Institutions with 1240 seats
- 2 Government Colleges (200 Seats)
- 1 SGDHER (100 seats)
- 1 Municipal Corporation College (100 Seats)
- 8 Private Colleges (740 Seats)
- 1 Deemed University (100 Seats)

### Total of 41 Institutions with 2195 Seats
- 8 Government Colleges (390 Seats)
- 33 Private Colleges (1805 Seats)

### Total of 53 Institutions with 2750 Seats
- 5 Government Colleges (360 Seats)
- 1 Municipal Corporation College (50 Seats)
- 46 Private Colleges (2310 Seats)
- 1 Deemed University (30 Seats)

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Source: Department of Health & Family Welfare, Government of Gujarat
Para Medical Colleges & AYUSH

Source: Department of Health & Family Welfare, Government of Gujarat
Government Clinical Services

- Total number of beds: 42,433
- Major Operations: 4,96,409
- OPD: 4,84,35,200
- Minor Operations: 6,07,631
- IPD: 53,38,346
- Delivery: 3,47,276

Source: Department of Health & Family Welfare, Government of Gujarat
Gujarat Health Policy 2016
Gujarat Health Policy 2016

Health & Family Welfare Department, Government of Gujarat provides various incentives and financial assistance to private sectors (Applicable till 31 March 2022 for entire state of Gujarat)

- Assistance of Rs. 15 Lakhs per seat per year in M.B.B.S. Course for five years.
- Reimbursement of electricity duty in the electricity bill for five years.
- 50% discount on the prevailing market price of the land for trust.
- 10% Capital subsidy of bank loan amount, upper limit of Rs. 10 Crores.
- Interest on authorized bank loan amount, upper limit of Rs. 40 Crores. (up to 4% interest subversion up to 7 years)
- Reimbursement of electricity duty in the electricity bill for five years
- 8 proposal for Super specialty hospitals across the state

- Govt. Hospital with available land and Equipment on lease
- Assistance of Rs. 7.5 Lakhs per year per seat in M.B.B.S. Course for five years.
- Reimbursement of electricity duty in the electricity bill for five years.
- Annual grant from government
- 2 colleges got LOP by MCI Palanpur & Dahod
- Only for purchase of new equipments.
- 20% of the equipments for entire State except backward Talukas.
- 30% of the equipments for backward Talukas of the state.
- 13 proposal received

At present there are 26 Medical Colleges with 4150 MBBS seats out of which 285 NRI seats. Government of Gujarat is also encouraging Ayurveda, Naturopathy & Yoga tourism

Source: https://gujhealth.gujarat.gov.in/health-policy.htm
Schemes and Programs implemented by Health Department in Gujarat
The Department of Health identified 11 indicators in the context of State comparison of Health index by NITI Aayog and special thrust areas for regular monitoring.

**7/11 indicators**
1. Maternal death (MMR)
2. Infant death (IMR)
3. Full Immunisation coverage
4. Low birth weight babies
5. Anaemia during pregnancy
6. Sex Ratio at Birth
7. Spacing methods
8. Nutrition
9. HIV, Tuberculosis, Communicable diseases and Epidemic control
10. Non communicable diseases
11. Mental health

**Special thrust areas**
1. Infant mortality rate
2. Maternal mortality ratio
3. Full immunisation coverage
4. Anaemia during pregnancy
5. Sex ratio at birth
The 7/11 Initiative (2/2)

Niti Aayog Key Focus Areas for Health (Gujarat State)
7 - Core Focus Areas

- Maternal Death
- Infant Death
- Immunization
- Nutrition
- Anaemic Mothers
- Low Birth Weight Babies at Birth
- Epidemic / Communicable Diseases / HIV-AIDS

4 - Additional Core Focus Areas

- Mental Health
- Sex Ratio at Birth
- Spacing between consequent deliveries
- Non Communicable Diseases NCDs
### Chiranjeevi Yojana
- Public Private Partnership model
- Aim: To provide qualitative delivery services at empanelled private health facilities and to increase Institutional Deliveries.
- A package of 100 deliveries @ Rs.3,80,000/-. 
- The package includes any type of services related to delivery, medicine, anesthesia, laboratory investigations or caesarean section operation
- Budget (2018-19): Rs. 35 crore

### New Initiative: “Vahan Akasmat Sarvar Sahay”
- Gujarat government launched “VAHAN AKSMAAT SARVAR SAHAY” scheme on 18/05/2018 with an objective to provide free immediate medical relief to road accident victim during first 48 hours
- Free treatment up to Rs. 50,000 per victim per episode
- Till date (June 2018) a total 404 claims with an amount of Rs.72,68,466 has been sanctioned

### Obstetric ICUs
- To ensure adequate obstetric and intensive care to pregnant mothers with life threatening complications, enhancing their survival opportunities

### School Health Check-up Programme
- Rashtriya Bal Swasthya Karyakram (RBSK)
- **Health Screening and Medical check-up** based on 4D’ - Free ‘Comprehensive Care’ for the Health & Well being of all children of Gujarat
Health Schemes/ Programmes/ Initiative in Gujarat (2/3)

Mukhyamantri Amrutum (MA) and MA- VATSALYA Yojana

- “MA” Yojana provides cashless treatment and coverage of catastrophic care targeted at the BPL population and is covering critical illnesses such as cardiovascular surgeries, neurosurgeries, burns and poly trauma, malignancies (cancer), renal (kidney) and neo-natal (newborn) diseases

- Under this scheme more than 64.07 lakh families have been enrolled and 12,10,585 claims worth Rs. 1710.83 crore has been claimed up to July, 2018

Kasturba Poshan Sahay Yojana - Conditional Cash Transfer

- Conditional cash transfer is a nutrition intervention which shall ensure the coverage of services, access to nutritious food and micronutrient supplement during the vital period of pregnancy.

- To facilitate adequate nutrition and rest during pregnancy, a cash support of Rs. 6000 to all the BPL pregnant woman is given

Development of 34 dedicated neonatal referral transport ambulances

- Neonatal Ambulance Services for Inter Hospital Transfer
### 108 Mobile Application

- 108 Mobile App for Android and iOS
- Citizen can register 108 Mobile App through Aadhar number
- can see nearby Hospital & Blood Bank Facility
- can track coming 108 Ambulance
- Hospital can track arriving 108 Ambulance
- 108 Emergency Response Centre can get incident location with citizen’s demographic details & uploaded Image & Video
- 108 Pilot can navigate incident location
- 108 Emergency Medical Technician can capture Patient clinic details in 108 Mobile App
- 108 Emergency Medical Technician can see nearby Hospital & Blood Bank Facility

### Gujarat Medical Service Corporation Limited (GMSCL)

The main functions of GMSCL are:

- Procurement of essential, lifesaving quality medicines, surgical goods & Insecticides
- Timely availability by creating highly decentralized storage capacity & distribution network.
- Procurement of quality medical equipment/Instrument
- Establishment of Diagnostic Medical Service Center
TeCHO+ (Technology enabled community health operations)

- **TeCHO+** is a mobile phone and web application to improve coverage and quality of community based **RMNCH-A services**
  - Launched by the **Hon. PM in Oct, 2017** for statewide scale up
  - **TeCHO+** is a job-aid for frontline health workers to ensure real time, point of care data entry
  - Life cycle approach from birth to old age by including **7+4 priority areas** and digitization of Family Health Survey data
  - Wide scope of **7+4: RMNCH-A, Malnutrition, non-communicable diseases, mental health, epidemics**
  - **AAA model** and interface for all better supervision: from ASHA/FHW/MPHW to taluka to district to state level for continuum of care and supportive supervision
  - **Aadhar linkage** and authentication
An interactive job aid to support, track and supervise efficiently

Reminders: Task Scheduling and Tracking

Videos: Behavior Change Communication

PHC Dashboard provides an overview of ASHA performance data, calculation of incentives, tracking use of medical supplies

Data Flow across Network

Task scheduling, Tabulating ASHA incentives, tracking medical stock

Data collection and diagnostic tool to allow the ASHA to respond to the need of the beneficiary

GYK EMRI Helpline
Helpline staff provide ASHA with information in emergency cases and facilitates referrals to medical facilities.
Other Government Initiatives (1/2)

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>e-Mamta (Mother and Child tracking System)</strong></td>
<td>To register individual pregnant women, individual children in the age group 0-6 and adolescents along with their full details to ensure complete service delivery of Ante Natal Care (ANC), Child birth, Post Natal Care (PNC), Immunization, nutrition and adolescent services and to track the left outs</td>
</tr>
<tr>
<td><strong>Kuposhan Mukt Gujarat Abhiyan</strong></td>
<td>State Government has given priority to malnutrition control activities</td>
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<tr>
<td></td>
<td>Over 60 lakh children of all Anganwadi centers in Gujarat screened and identified severely acute malnourished (SAM) children were referred CMTC/NRC at nearby health facility and treated with “Bal Amrutam”</td>
</tr>
<tr>
<td><strong>Breast and Cervical Cancer Screening Program</strong></td>
<td>Early detection and timely treatment for breast and cervical cancer in women aged between 30 to 59 years</td>
</tr>
<tr>
<td></td>
<td>Diagnosed cases of both cancers can avail treatment benefit through “MA” &amp; “MA Vatsalya” Yojana</td>
</tr>
<tr>
<td><strong>Mukhyamantri Nidan Yojna (MNY)</strong></td>
<td>Govt. of Gujarat has launched this scheme under which people of Gujarat can avail the free diagnostic facilities from public health institutes</td>
</tr>
<tr>
<td><strong>Diabetes Screening Abhiyan</strong></td>
<td>Early Diagnosis through screening and Treatment and Prevention of Complication due to Diabetes</td>
</tr>
<tr>
<td></td>
<td>More then 10,000 Diabetes Centers has been started where, ~ 6.3 million people have been screened, of which ~6% suspected cases detected</td>
</tr>
</tbody>
</table>
**Other Government Initiatives (2/2)**

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Details</th>
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</thead>
</table>
| Cleft lip and cleft palate free Gujarat | - In order to improve physical, social and psychological health of each and every child effected by Cleft lip/ Palate, this program was launched under ‘School Health-Rashtriya Bal Swasthya Karyakram.”
- Free of cost operation facilities along with pre and post-operative care is provided to each beneficiary.
- Till date thousands of operations have been conducted successfully and Government is near to achieve the goal to minimize the Infant Mortality Rate due to this defect |
| Cochlear Implant | - Cochlear Implant treatment of Congenital Deafness is provided free of cost to all Children under the School health program
- Total cost of the treatment is around Rs. 6 to 7 lakh that is borne by Govt. of Gujarat.
- Almost 600 Children have benefited till date |
| Dialysis Services | - Inclusion of Pradhan Mantri National Dialysis Programme by Government of India under NHM
- Government has established facilities of hemodialysis unit to provide dialysis services free of cost (no charges) to the patient at district & local level public health facilities.
- Dialysis Services are provided by 343 Dialysis Machines by free of cost (no charges) (more than 500 dialysis on daily basis).
- More than 13,500 dialysis is done every month in the state, that includes more than 2000 patients. |
| Obstetric ICUs | - To accelerate reduction in MMR, innovation through establishment of Obstetric ICUs across all medical college hospitals of Gujarat was done
- Government has establishment of 20 Obstetric ICUs across the state
- Obstetric ICUs in Gujarat are making huge difference in tertiary care in maternal health |
| 108 Ambulance Services & KHILKHILAT Service | - The 108 Emergency Response Service is a comprehensive emergency service that serves not only medical emergencies but also police and fire emergencies. 585 ambulances serve over 6.03 crore people covering all 33 districts
- A Free drop back facility service for deliveries in Government Health facility. Total 258 vehicles are available in this program |
Alignment with National Health Programmes

**Revised National T.B. Control Programme (RNTCP)**
- The treatment success rate 91% among new TB cases and 78% among re-treatment TB cases
- Among MDR confirmed cases, 91% MDR TB put on treatment

**National Vector Borne Diseases Control Programme:**
- Annual Parasitic Index: 0.64 in, lowest in the history of state.
- 33 Dengue detection Centers across the state

**National Leprosy Eradication Programme**
- Prevalence rate 0.98 per 10000 population and 6447 patients are under treatment.

**National Blindness Control Programme**
- First in India for Free spectacle distribution to school going children.
- (Double against target) cataract operations were done.
- State prevalence rate of Blindness is 0.73%. (National Prevalence 1%).

**Other Programmes**
- Pulse Polio Immunization (PPI) Program, Integrated Diseases Surveillance Programme (IDSP), National Mental Health Programme (NMHP), National Programme for Health Care of the Elderly (NPHCE), National Programme for Prevention and Control of Cancer, Diabetes, Cardiovascular Diseases and Strokes (NPCDCS), Oral Health Screening Programme and National AIDS control Programme
Quality Initiatives

- A grade in Swachhta Mission Audit
- >70% Scores in Kayakalp
- NQAS targeting MCH, DH, SDH and all FDPs
- Targeting MCH, DH
- All the facilities to achieve LaQshya certification
Health Success Story in Gujarat

- 39 Facilities accredited for NABH/NABL
- DH Vyara: First Public Health Facility to achieve National level accreditation for NQAS
- Sola Civil Hospital and GMERS Gandhinagar to achieve India’s first certification under LaQshya
- 186 Facilities awarded for KAYAKALP, 651 with more than 70% score in the year 2017-18
- 14583 participants trained in Quality Improvement Programme
Award recognition at National level 2017-18
Health Success Story in Gujarat - Awards

1) The State of Gujarat was awarded for securing First Rank for Maximum improvement in OPD Services among all the States in Public Health Facilities during the period of 2015 – 16 to 2016 – 17

2) Best Affordable Healthcare Initiative in Healthcare Summit 2016 at Jaipur for MA Yojana

3) ELETS for “Best Accessible Healthcare Initiative” on 26th March, 2018 for MA Yojana
Medical Tourism in Gujarat

Key facilitators for Advantage Gujarat

- **Substantially low costs** involved for medical treatment compared to USA or UK.
- **Zero waiting periods** for all patient either requiring emergency treatment or otherwise
- **Good connectivity by air and roads**
- **Access to Latest Technology**
- **Large percentage of Non Resident Gujaratis (NRG) among Non Resident Indians (NRI)**
- **Experienced doctors updated with global advances** as they are regularly participating in world medical conferences/ CMEs.
- **Fluency of English** is an additional advantage

Opportunity to club Medical Treatment with Tourism and Religious visit

Major Specialties

- Cardiology
- Joint Replacement
- Organ Transplant
- Infertility Treatment
- Dental Treatment
- Cosmetic Surgery and others
Partners in Gujarat’s Healthcare Sector
Glimpse of Successfully Commissioned Projects under Vibrant Gujarat Summits

Investment: Rs. 150 crore

VG 2009: CIMS Hospital, Ahmedabad
Investment: Rs. 105 crore

VG 2009: Zydus Hospital, Ahmedabad
Investment: Rs. 100 crore

VG 2011: Charusat Hospital, Healthcare & Research Foundation, Changa
Investment: Rs. 30 crore
Glimpse of Successfully Commissioned Projects under Vibrant Gujarat Summits

VG 2013: HCG Cancer Care Hospital, Vadodara
Investment: Rs. 50 crore

VG 2015: SAACHI Hospital, Surat
Investment: Rs. 15 crore

VG 2015: IRIS Hospital, Anand
Investment: Rs. 20 crore

VG 2017: Shalby Hospital, Naroda & Surat
Investment: Rs. 200 crore
Opportunities Galore
Why Invest in Healthcare

**Increasing Disposable Income**
Share of population earning more than US$ 12000 p.a. was at 2% in 2013 and is said to increase to 8% in 2020

**Increasing Insurance Coverage**
Health insurance coverage is expected to quadruple over the next 10 years from its current size of US$ 60 billion

**Increasing life expectancy at birth**
Life expectancy to increase from 64 years in 2005 to 70 years in 2020

**Rising prevalence of lifestyle diseases**
Share in total disease burden to increase from 53% in 2008 to 76% by 2020

**Boom in medical tourism**
Market expected to double from US$ 4 billion in 2016 to US$ 8 billion by 2020

Untapped Potential

**Infrastructure**
US$ 200 billion is expected to be spent on medical infrastructure by 2024

**Medical Tourism**
Visas for international patients and attendants introduced to ease medical tourism

**Health and Wellness Centre**
1.5 lakh centers with a budget of US$ 1.8 billion will bring the healthcare system closer to homes of people

**Robotic Process Automation (RPA)**
RPA to improve efficiency of healthcare workforce, reducing costs and creating value proposition
Other segments of Investment

- Remote Diagnosis
- Telemedicine
- VR for surgeries
- m-health
- e-ICU
- Internet of Medical Things (IOMT)
- Healthcare Start-ups
- Mobile and Wearable Devices
- Artificial Intelligence and Big Data Analytics
- Robotic Surgeries
Health and Family Welfare Department

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Thank you