

**11<sup>th</sup> NAT+HEALTH<sup>®</sup>**  
Healthcare Federation of India  
**ANNUAL**  
**AROGYA BHARAT**  
**SUMMIT 2025**



# POST EVENT REPORT

**PROPELLING  
HEALTHCARE IN INDIA  
TOWARDS VIKSIT  
BHARAT**

A Cutting-Edge CXO Healthcare  
conclave organized by NATHEALTH  
to propel the sector forward



## NATHEALTH Knowledge Reservoir: White Papers & Reports



Realizing the full Potential of the MedTech Industry in India 2.0



Realizing the full potential of MedTech Industry in India



Forging a Safer Future – India’s Blueprint for Patient Safety Excellence



Overcoming Roadblocks to increase PPPs in Tier 2 Cities & Beyond



Digital Governance System for Ultrasound Devices



Catalysing Digital Health in India



Highlighting the need for uninterrupted growth in the MedTech Industry



Annual Summit Report 2021



Annual Summit Report 2022



Annual Summit Report 2023



Annual Summit Report 2024

Report transcribed, written, compiled, edited & designed by **EVOKE (Health Biz Insight)**



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# Audience Speaks



Audience said they would gladly recommend the event to someone else

**77%**



Audience was satisfied about the quality of speakers

**62%**



Audience showed willingness to become a NATHEALTH member

**70%**



Audience was satisfied with the relevance of issues discussed

**60%**



# SUMMIT AGENDA

<b>Inaugural Session</b> Time: 10:00 am - 11:15 am IST	
<b>Viksit Bharat – Catalyzing Stronger Partnerships between Public and Private Sector            Building New Capacity &amp; Efficiency in Healthcare</b> NATHEALTH Leadership Team welcome the key plenary session dignitaries followed by <b>Lamp Lighting</b>	
<b>10:00 am – 10:10 am</b> Opportunities to shape the healthcare ecosystem in the upcoming years and the role of NATHEALTH	<b>Mr. Abhay Soi</b> President, NATHEALTH, Chairman and Managing Director Max Healthcare Institute Limited
Special Video Address	<b>Shri Jagat Prakash Nadda</b> Hon'ble Health Minister Ministry of Health and Family Welfare and Ministry of Chemicals and Fertilizers, Government of India
Special Address	<b>Shri Kiran Gitte</b> Secretary, GA (Good Governance) and Health and Family Welfare Department, Government of Tripura

<b>Session</b> Time: 11:30 am – 1:00 pm	
<b>A New Look at Healthcare Compliances in India and ways to accelerate sectorial momentum while ensuring adherence</b> Knowledge Partner: EY	
<b>11:30 am – 11:35 am</b> Introductory Remarks and Context Setting	<b>Ms. Ameera Shah</b> Senior Vice President, <b>NATHEALTH</b> and Promoter and Executive Chairperson, Metropolis Healthcare
<b>11:35 am – 12:35 pm</b> Understanding the compliance landscape and reform opportunities in healthcare. NATHEALTH Global Compliance Management recommendations	<b>Overview by:</b> <b>Mr. Tarun Pandey</b> Partner - Business Consulting, EY Global Compliance Management  <b>Fireside Chat:</b> <b>1. Mr. Varun Khanna</b> , Co-Chair-NATHEALTH Provider Forum and Group MD, Quality Care India Ltd. <b>2. Mr. Sanjeev Vashishta</b> , Co-Chair NATHEALTH Northern Region and MD, PathKind Diagnostics (P) Ltd. <b>3. Mr. Chaitanya Sarawate</b> , Governing Council Member, NATHEALTH & President & CEO, India & South Asia, GE Healthcare, SA  <b>Moderator:</b> Ms. Anisha Nair Dhawan
<b>12:35 pm – 12:45 pm</b> Special Address	<b>Mr. Rajib Sen</b> Senior Adviser (Health), NITI Aayog
<b>12:45 pm – 1:00 pm</b> Address by Chief Guest of the Session	<b>Dr. Vinod K Paul</b> Hon'ble Member (Health), NITI Aayog

# SUMMIT AGENDA

1:00 pm - 2:00 pm • Lunch Break & Leadership Team Media Briefing

## Session

Time: 2:00 pm - 3:00 pm

### Realizing the full potential of MedTech Industry in India 2.0

Knowledge Partner: EY

**2:00 pm - 2:07 pm**

MedTech 2.0 NATHEALTH PwC white paper key areas

**Dr. Rana Mehta**

Partner and Leader, Healthcare, PwC India

**2:07 pm - 2:20 pm**

Industry Recommendations: Realizing the full potential of MedTech Industry in India 2.0

**Mr. Hariharan Subramanian**

NATHEALTH MedTech Forum Leader & MD, Siemens Healthcare Pvt. Ltd.

**2:20 pm - 2:45 pm**

Exploring convergence and consensus across stakeholders to achieve improved health outcomes

**Facilitator:**

**Shri C.K. Mishra**

Former Health Secretary & Former Secretary, Environment, Forest and Climate Change, Government of India

**Speakers:**

**Mrs. Roli Khare**

Deputy CEO, Government e-Marketplace (GeM)

**Mr. Manish Sardana**

Managing Director and General Manager South Asia, Vygon India Pvt. Ltd.

**Moderator:**

Ms. Anisha Nair Dhawan

**2:45 pm - 3:00 pm**

Keynote Address by the Session Chief Guest

**Dr. Rajeev Singh Raghuvanshi**

Drugs Controller General of India, Central Drugs Standard Control Organization (CDSCO), Government of India



# SUMMIT AGENDA

<b>Session</b> Time: 3:00 pm – 3:30 pm	
<b>Accelerating Digital Health Adoption &amp; Creating Pathways for Scalable Healthcare Innovations</b> Knowledge Partner: PATH	
<b>3:00 pm – 3:05 pm</b> Introductory Remarks and Context Setting	<b>Video foreword setting the context – Introducing the programs</b>
<b>3:05 pm – 3:10 pm</b> Looking ahead towards impact and scale	<b>Mr. Sunil Thakur</b> Chief of Mission- NATHEALTH Foundation & GC member Partner, Quadria Capital
<b>3:10 pm – 3:30 pm</b> Charting the collective roles & responsibilities for the NATHEALTH & NATHEALTH Foundation eco systems	<b>Speakers:</b> <ul style="list-style-type: none"> <li><b>Dr. Atul Mohan Kochhar</b>, CEO, The National Accreditation Board for Hospitals &amp; Healthcare Providers (NABH)</li> <li><b>Dr. Raajiv Singhal</b>, Founding Member, Managing Director &amp; CEO, Marengo Asia Healthcare</li> <li><b>Mr. Neeraj Jain</b>, Director, Board- NATHEALTH Foundation, Country Director – India and Director Growth Operations – Asia, Middle East &amp; Europe, PATH</li> </ul> <b>Moderator:</b> <b>Mr. Amit Mookim</b> CEO, Immuneel Therapeutics

<b>Session</b> Time: 3:30 pm – 4:15 pm	
<b>Role of (National Health Claim Exchange (NHCX) in Digital Health Convergence</b> Knowledge Partner: Deloitte	
<b>3:30 – 3:35 pm</b> Introductory Remarks and Context Setting	<b>Dr. Sangita Reddy</b> Vice President, NATHEALTH Joint Managing Director, Apollo Hospitals Enterprise Ltd.
<b>3:35 pm – 3:45 pm</b> NHCX Project update	<b>Sh. Vikram Pagaria</b> Director IT, National Health Authority (NHA)
<b>3:45 pm – 4:15 pm</b> Panel Discussion	<b>Additional Speakers:</b> <b>Dr. Vikram Jit Singh Chhatwal</b> Chairman and Whole Time Director, Medi Assist Group  <b>Dr. Ajay R. Nair</b> CEO, SWASTH  <b>Moderator:</b> <b>Mr. Ashish Rampuria</b> Partner – Strategy, Risk & Transactions, Deloitte India

# SUMMIT AGENDA

<b>Session</b> <b>Time: 4:15 pm – 5:15 pm</b>	
<b>Igniting Medical Value Travel (MVT) and Building the Heal in India Brand</b> Knowledge Partner: Deloitte	
<b>4:15 pm – 4:20 pm</b> Introductory Remarks and Context Setting	<b>Dr. Om Manchanda</b> <b>NATHEALTH</b> Treasurer, MD Dr. Lal Path Labs
<b>4:20 pm – 4:30 pm</b> <b>MVT Opportunity for India and critical success factors</b> <ul style="list-style-type: none"> <li>• <i>Current MVT opportunity, growth and drivers</i></li> <li>• <i>India's contribution by source markets, strengths &amp; gaps</i></li> <li>• <i>Critical factors to ensure success of Heal in India initiative1</i></li> </ul>	<b>Presentation by:</b> <b>Mr. Parijat Ghosh</b> Asia Pacific Leader for Healthcare & Life Sciences, Partner of Bain & Company
<b>4:30 pm – 4:40 pm</b> <b>Peer to peer best practice sharing/ global lessons</b> Latest view of MVT destination map– countries who have successfully tapped the market with focus on specific case studies	<b>Presentation by:</b> <b>Ms. Aarushi Bhatnagar</b> Senior Health Economist, World Bank*
<b>4:40 PM – 5:30 PM</b> <b>Strengthening 'Heal in India' initiative, next steps for India: Panel Discussion</b> <ul style="list-style-type: none"> <li>• Role of private sector within 'Heal in India'</li> <li>• Policy support and incentives from govt.</li> <li>• Unified approach to promotion, inbound marketing and targeted communication outreach under the 'Heal in India' brand</li> <li>• Partnerships with key stakeholders in source market</li> </ul>	<b>Panel Discussion</b> <b>Speakers:</b> <ul style="list-style-type: none"> <li>• <b>Ms. Kanoko Oishi</b>, Vice Chairman of MEJ; and President, and CEO of Mediva Inc</li> <li>• <b>Dr. Upasana Arora*</b>, Managing Director, Yashoda Super Speciality Hospitals Pvt. Ltd.</li> <li>• <b>Dr. Ritu Garg</b>, Chief Growth and Innovation Officer, Fortis Healthcare Ltd</li> <li>• <b>Dr. Ankit Thakker</b>, Executive Director and CEO, Jupiter Hospital</li> </ul> <b>Moderator:</b> <b>Mr. Parijat Ghosh</b> , Asia Pacific Leader for for Healthcare & Life Sciences, Partner of Bain & Company
<b>Vote of thanks and thanking sponsors</b>	<b>Closing by 5:30 pm</b>



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# President's Note

## Mr. Abhay Soi

**President**, NATHEALTH,  
**Chairman** and **Managing Director**,  
Max Healthcare Institute Limited

Greetings Everyone.

It gives me great pleasure to share the 2025 Annual Report covering the 11th NATHEALTH Annual Arogya Bharat Summit held on 19th March 2025. As I pen this note following our recently concluded summit, I find myself filled with immense gratitude and pride in what we have collectively accomplished. This summit, centered on "Ideas to propel healthcare in India towards Viksit Bharat," marked the culmination of our journey over the past year, which has been both challenging and deeply rewarding.

The 11th Summit was held at a critical juncture, following the announcement of the 2025-26 budget which underscored the government's commitment to health infrastructure, workforce expansion, and digital transformation. As India accelerates toward the vision of Viksit Bharat, healthcare reforms and innovations must move in tandem. Looking back at the vibrant discussions and breakthrough ideas shared over all the plenary sessions of the summit, I am convinced that NATHEALTH continues to stand as the unified voice that Indian healthcare needs as we march toward the vision of a developed India. The exceptional participation from government representatives, industry leaders, innovators, and healthcare providers only further demonstrates the healthcare sector's unwavering commitment to positive transformation.

The shared vision during our opening plenary on strengthening public-private partnerships—of building new capacity and enhancing efficiency—reinforced my belief that collaboration remains our greatest strength. Fostering concrete partnerships with the public sector was among NATHEALTH's top priorities, and seeing this dialogue mature today has been personally fulfilling. At NATHEALTH, we believe this transformation can only be achieved through synergistic collaboration between the public and private sectors—harnessing their unique strengths to deliver comprehensive, value-based care across the nation.





The conversations around healthcare compliance challenges struck a chord with many of us who have navigated these complexities daily. The session saw several experts dive into the intricacies of regulatory challenges faced by the sector and explore reforms that promote compliance without stifling innovation. These discussions are vital as we seek to establish a unified, patient-centric regulatory framework that supports small organizations and reduces systemic fragmentation.

Our renewed focus on MedTech at the 11th Summit comes from the recognition that India can very well capitalize on the incredible innovation energy within this sector. As someone who has watched India's MedTech landscape evolve over decades, I can confidently say we stand at the threshold of something transformative. The industry's commitment to designing for the new India—extending beyond metros to smaller cities and towns—aligns perfectly with our vision of inclusive healthcare.

At NATHEALTH, we have keenly realized that the digital health wave is a cornerstone of India's healthcare evolution. Our dedicated session on Accelerating Digital Health Adoption explored real-world solutions to digitize healthcare delivery—from smart hospitals to AI-enabled diagnostics—ensuring these advances benefit even the remotest parts of India while the session on healthcare insurance spotlighted our commitment to financial inclusion. Insurance is no longer a support system—it is central to care delivery and sustainability. Stakeholder conclusions are unanimous: deeper insurance penetration and schemes like Ayushman Bharat are essential to affordability and equity. Our plenary session on National Health Claim Exchange (NHCE) in Digital Health Convergence showcased the need for interoperability and automation in claims processing - which can streamline the patient experience, drive efficiencies, and build trust across stakeholders; while our final plenary session explored the latent potential of medical value travel in India, which the healthcare section remains keen to tap into. Each of these sessions echoes our commitment to turning ideas into action.

NATHEALTH's Digital Health Masterclass and Health Nexus Accelerator initiatives are crucial interventions that are set to bear fruit. Today, with 5,000 providers trained across 50 cities and 25 promising startups supported, we look at incremental and steady growth. We've nurtured these initiatives together and they will continue to transform India's healthcare landscape long after my term ends.

The 11th NATHEALTH Annual Arogya Bharat Summit was not just a reflection of where we are, but a launchpad for where we aspire to go—a healthier, more equitable India where healthcare is truly a driver of national development. As India positions itself as a premier destination for medical value tourism, we must capitalize on our strengths—clinical expertise, cutting-edge technology, and cost-effectiveness—while addressing challenges in global awareness, stakeholder alignment, and integrated patient pathways.





While the summit celebrated bold ideas and significant progress, it also shone a light on the road ahead. Challenges such as regulatory complexity, the need for enabling frameworks for private stakeholders, and persistent delivery gaps must be met with collective will and action.

The response to the 11th Annual Summit has been deeply encouraging. The energy and engagement from participants reflected a shared commitment to advancing India's healthcare landscape. From thought-provoking plenaries to actionable insights in our breakout sessions, the summit served as a dynamic platform for cross-sector collaboration. It reaffirmed NATHEALTH's evolving role, not just as a convener, but as a catalyst for scalable transformation across policy, innovation, and impact.

As we look forward, NATHEALTH remains steadfast in its mission to accelerate India's healthcare journey toward Viksit Bharat. Our commitment is to co-create solutions that are future-ready, inclusive, and driven by collaboration. Together—with policymakers, providers, innovators, and the broader ecosystem—we will continue to reimagine, reform, and reenergize healthcare for every Indian. Thank you once again for your contribution to the success of the 11th Annual Arogya Bharat Summit. We're only just getting started.

To our government partners who have been receptive to our ideas, to industry leaders who have generously shared expertise, to startups bringing fresh perspectives, and to every NATHEALTH member who has contributed to our collective voice—my heartfelt thanks. You have made this journey meaningful. The road to Viksit Bharat is long, but after witnessing the energy, commitment, and ingenuity displayed at our summit, I am more optimistic than ever about Indian healthcare's future.

Let us reimagine, reform, and reenergize healthcare in India—together.

I leave this year with profound gratitude and continuing commitment towards the sector's betterment.



# Executive Summary

The 11th NATHEALTH Arogya Bharat Summit 2025, held on March 19th, focused on aligning healthcare with India's development goals. The theme "Ideas to Propel Healthcare in India Towards Viksit Bharat" addressed the sector's ongoing transformation.

Key discussions covered infrastructure development, digital health integration, regulatory reform, financial inclusion, and startup support. Despite medical advances, significant challenges remain - 63 million Indians face poverty due to healthcare expenses, insurance coverage remains inadequate, and regulatory fragmentation limits progress. The country's advantages include world-class clinical expertise, digital infrastructure, cost-effective treatment models, and a growing MedTech sector. To bridge the gap between aspiration and access, interventions that are deliberate, collaborative, and forward-looking must be prioritized. The transformation India seeks will not be driven by isolated efforts or incremental change. It will require multi-stakeholder alignment, investment in future-ready infrastructure, support for smaller players, and the creation of integrated ecosystems that center around both technological advancement and patient well-being.

As a convener, co-creator, and catalyst of sector-wide transformation, NATHEALTH continues to champion systemic solutions through initiatives such as the Health Nexus Accelerator to empower healthcare startups, the Digital Health Masterclass to upskill providers and promote adoption of digital tools and the Patient Safety Initiative to institutionalize quality and accountability across the care continuum. These initiatives underscore the importance of engaging all actors in the healthcare value chain—from policymakers and regulators to hospitals, insurers, startups, and patients—in a unified mission to build a healthcare system that is not only accessible and efficient, but also equitable, transparent, and sustainable.

The 11th Annual Arogya Bharat Summit 2025 emphasized creating scalable solutions that balance digital transformation with patient safety, compliance with innovation, and affordability with quality.

## Objectives of the 11th NATHEALTH Arogya Bharat Summit

- 1. Strengthen Public-Private Partnerships** to expand healthcare infrastructure and reach.
- 2. Streamline Regulatory Compliance** to improve ease of doing business while ensuring safety and quality.
- 3. Accelerate the Growth of the MedTech Sector** through innovation, localization, and supportive policy.
- 4. Advance Digital Health Adoption** among providers of all sizes, especially in Tier 2 and Tier 3 cities.

# Executive Summary

5. **Digitize Healthcare Financing** through platforms like NHCX, enabling real-time, interoperable claims processing.
6. **Position India as a Global Medical Travel Destination** through cohesive branding, stakeholder alignment, and integrated patient experiences.
7. **Promote Inclusive Innovation Ecosystems** that support startups, R&D, and collaboration across academia, government, and industry.

## Strategic Intervention Strategies for All Stakeholders

The healthcare sector continues to face structural bottlenecks—from fragmented service delivery and inconsistent regulatory enforcement to limited digital adoption and underutilized insurance frameworks. Emerging opportunities in MedTech, digital health, and medical value travel remain underleveraged due to gaps in stakeholder alignment, policy execution, and infrastructure readiness. Stakeholders across the ecosystem must commit to deliberate, multi-dimensional action and these interventions will be critical to ensuring the scalability, equity, and sustainability of Indian healthcare:

### For Policymakers and Regulators

- Establish centralized, outcome-focused frameworks for PPPs, compliance, and MVT and accelerate the adoption of national digital health standards and promote ABDM integration.
- Develop incentive-based policies to support small providers in digital and compliance transitions.
- Expand global accreditation visibility and create tiered quality rating systems for hospitals.

### For Healthcare Providers

- Invest in digital transformation, clinical quality, and patient experience infrastructure.
- Collaborate with startups and innovators to co-develop scalable health tech solutions.
- Align operations with ABDM, NABH, and NHCX to drive efficiency and data transparency.

### For Insurers and TPAs

- Innovate insurance products (OPD, usage-based, parametric models) tailored for underserved segments.
- Support adoption of AI-driven claims platforms to reduce fraud and improve turnaround time.
- Partner with regulators and providers to align digital workflows and improve interoperability.

# Executive Summary

## For Industry and Innovators

- Leverage India's software strengths to drive MedTech software innovation and integration.
- Engage in national accelerators and structured mentorship programs to commercialize healthcare solutions.
- Co-develop technologies that are affordable, patient-centric, and aligned with India's care delivery gaps.

## For Investors and Development Partners

- Invest in outcome-driven health models and scalable digital infrastructure.
- Support platforms that drive innovation in patient safety, affordability, and preventive care.
- Collaborate with the government and NATHEALTH to fund strategic pilots and regional expansion.

## Objectives of the 11th Annual Arogya Bharat Summit 2025

1. To serve as a platform for collaborative dialogue addressing national healthcare priorities
2. To align healthcare transformation efforts with India's broader developmental agenda
3. To support innovation, entrepreneurship, and digital readiness in the health sector
4. To catalyze sustainable infrastructure growth through private sector engagement
5. To facilitate reforms in policy and regulation supporting inclusivity, equity, and scalability

## Plenary Session 1: Catalyzing Stronger Partnerships Between Public and Private Sector – Building New Capacity & Efficiency in Healthcare

The opening session of the summit focused on the critical role of public-private partnerships (PPPs) in expanding healthcare access and improving system efficiency across India.

## Challenges Addressed

India's healthcare sector continues to face significant challenges related to infrastructure development, workforce shortages, and unequal access to services across geographies. Fragmentation between central and state healthcare initiatives, uneven policy implementation, and limited private sector penetration in underserved regions have contributed to inefficiencies. Additionally, barriers to investment, such as slow regulatory clearances and limited viability for private players in smaller markets, have hampered expansion. Digital adoption, although progressing, remains uneven and constrained by infrastructure and interoperability limitations.

# Executive Summary

## Key Discussion Points

- The need for district-level infrastructure expansion was emphasized, particularly the construction of high-end hospitals and diagnostic centers to address service gaps in smaller cities and rural areas.
- Public-private partnerships (PPPs) were identified as a critical enabler for infrastructure development, with recommendations for creating a national PPP framework with clear guidelines, transparency measures, and accountability mechanisms.
- The healthcare workforce shortage—including doctors, nurses, and allied health professionals—was recognized as a major bottleneck, with a call for rapid expansion of medical education capacity and incentive structures to attract professionals to underserved regions.
- Regulatory contradictions across central and state laws were noted as barriers to healthcare service delivery, with specific examples highlighting differing policies on medical devices and digital signatures.
- The session highlighted the importance of telemedicine and digital health tools, including AI-driven diagnostics and wearable technologies, in extending services to remote areas while enhancing early detection and monitoring.
- The integration of Electronic Health Records (EHRs) was viewed as essential for continuity of care, though concerns around data security and privacy were raised, underscoring the need for robust regulatory safeguards.
- Universal Health Coverage (UHC) was positioned as a core pillar of healthcare equity, with a recommendation to scale up insurance penetration through innovative hybrid models that combine public subsidies with private sector execution.
- The potential for medical value tourism was acknowledged, with a focus on improving patient pathways, global branding, and integrated service models to attract international patients.
- A multi-stakeholder approach—involving policy, investment, digital technology, and human capital—was endorsed as essential to drive healthcare transformation in alignment with national development goals.

## Plenary Session 2: A New Look at Healthcare Compliances in India

India's healthcare sector has been recognized as a growing investment opportunity, driven by demographic shifts, rising non-communicable diseases, and digital innovation. This session focused on identifying the regulatory challenges faced by hospitals, diagnostics, and the medical technology sector, and explored actionable solutions to streamline compliance while ensuring quality and patient safety.

# Executive Summary

## Challenges Addressed

The session examined the multifaceted compliance burden borne by healthcare providers across India. Regulatory overlaps, the absence of harmonized digital systems, slow approval timelines, and frequent changes in rules have been found to place disproportionate strain on healthcare providers—particularly smaller institutions and startups—limiting scalability and innovation. Sector-specific difficulties across hospitals, medical device manufacturing, and diagnostics were also discussed in detail, revealing the urgent need for modernization, risk-based regulation, and improved intergovernmental coordination.

## Key Discussion Points

- The current compliance landscape was found to be overly complex, with over 29,000 compliance requirements across 15 states and approximately 1,400 licenses needed for healthcare operations.
- Regulatory contradictions—such as differing interpretations of central acts like PCPNDT across states—were highlighted as significant obstacles for multi-state healthcare entities.
- Fragmentation across state, municipal, and central authorities was identified as a major cause of delays, redundant processes, and confusion, especially for cross-functional sectors such as diagnostics and medical technology.
- Sector-specific bottlenecks were outlined:
  - Hospitals face extensive pre-construction delays and excessive documentation requirements.
  - Medical device manufacturers operate under inconsistent classifications and must comply with regulations from multiple ministries.
  - Diagnostic labs struggle with workforce shortages and uneven regulatory enforcement, especially outside the organized sector.
- A single-window clearance system was proposed to centralize and streamline approvals, reduce delays, and enable better coordination across departments.
- Emphasis was placed on developing a patient-centric regulatory framework, with compliance metrics tied to clinical outcomes rather than administrative checklists.
- The adoption of risk-based regulatory approaches—allowing differentiated treatment of low- and high-risk services—was strongly supported.
- Proposals were made to integrate technology and digitization into compliance systems, including the establishment of a national, interoperable reporting and documentation platform.
- Regulatory timelines and transparency were identified as critical, with suggestions for introducing “deemed approvals” where reasonable timelines are exceeded.

# Executive Summary

- It was recommended that regulatory reforms consider the capacity of small organizations, which often lack dedicated compliance teams.
- The importance of focusing on regulatory outcomes—access, affordability, and quality—was emphasized, with a shift from rigid process control to measurable healthcare impact.

## Plenary Session 3: Realizing the Full Potential of the MedTech Industry in India 2.0

- This session highlighted the transformative role of medical technology (MedTech) in India's healthcare landscape and examined strategies required to support its growth and integration. With the domestic MedTech market poised for exponential expansion, the discussion focused on challenges currently impeding the sector's progress and the policy frameworks necessary to establish a robust, accessible, and innovation-led MedTech ecosystem.

### Challenges Addressed

The MedTech sector was identified as a critical pillar of healthcare delivery, yet significant barriers to scale, accessibility, affordability, and regulatory efficiency persist. The high cost of production, lack of demand aggregation, tariff structures, and insufficient distribution networks—particularly in Tier 2 and Tier 3 cities—were recognized as major obstacles. Concerns were also raised around balancing technology with human interaction in care delivery, highlighting the importance of integrating MedTech at the point of care rather than treating it as a standalone solution.

### Key Discussion Points

- MedTech was positioned as a critical enabler of last-mile healthcare delivery, particularly in regions lacking adequate human resources and infrastructure.
- Affordability remained a central concern, with calls for a pricing structure that ensures both industry sustainability and widespread patient access.
- A geographic shift in demand from metros to smaller towns and cities was observed, prompting the need for localized product design, pricing, and supply strategies.
- Technology was encouraged to act as a bridge, not a replacement, for human care.
- Structured and predictable policy frameworks were emphasized - to provide stability for long-term MedTech investments.

# Executive Summary

- Existing regulatory frameworks were recommended for streamlining, with emphasis on clear timelines, simplified approvals, and performance-based criteria.
- Global harmonization of regulatory standards was proposed to enable better international market access while ensuring domestic capacity building.
- The shift in the government's role from provider to payer was noted as a major evolution, affecting procurement and policy priorities.
- Four foundational pillars were outlined to build India's MedTech sector:
  - **Stimulating Demand** – through broader insurance coverage, expansion of GeM procurement to private entities, and development of component manufacturing ecosystems.
  - **Accelerating Software Integration** – recognizing software and AI as essential MedTech components, leveraging India's IT strengths for innovation.
  - **Addressing Affordability** – via tariff rationalization for essential technologies while supporting phased localization.
  - **Improving Ease of Business** – including reform of retrospective Quality Control Orders (QCOs), capacity expansion for testing and certification, and prospective compliance policies.
- The Government e-Marketplace (GeM) was highlighted as an effective procurement tool, enabling competitive pricing, simplified documentation, and access to a broad supplier base.
- From the regulatory perspective, the Central Drugs Standard Control Organization (CDSCO) was reported to have significantly expanded its licensing capacity, particularly for high-risk devices and diagnostics.
- A balanced policy of encouraging local manufacturing while recognizing the continued need for imports was advocated.
- Digital health innovation, including Software as a Medical Device (SaMD) and AI-driven diagnostics, was recognized as a major growth area requiring tailored regulatory support.

## Spotlight: MedTech 2.0 White Paper and Strategic Partnerships

As part of its commitment to shaping a forward-looking MedTech ecosystem, NATHEALTH, in collaboration with PwC, released the MedTech 2.0 White Paper, offering a comprehensive outlook on the future of India's medical technology industry. The report projects industry growth to \$30 billion by 2030, outlining key imperatives such as affordability, innovation, demographic preparedness, and outcome-driven healthcare. It emphasizes India's demographic transition—where one in five citizens will soon be over the age of 60—and urges policymakers to prioritize healthy aging and longevity.

# Executive Summary

The white paper advocates for a shift from volume-based to value-based care models, while reinforcing the need for predictable policy environments, startup enablement, and global regulatory harmonization to drive sustained growth. As part of its strategic engagement, NATHEALTH was recognized for fostering multi-sectoral collaboration through platforms such as the Health Nexus Accelerator and partnerships with institutions including IIT Delhi, and industry leaders to support MedTech startups. These collaborations offer late-stage innovators access to mentorship, clinical validation, funding channels, and regulatory navigation.

## Plenary Session 4: Accelerating Digital Health Adoption & Creating Pathways for Scalable Healthcare Innovations

As India continues its pursuit of Viksit Bharat, the integration of digital health into mainstream care delivery has been recognized as not merely beneficial but essential. This session explored the current state and future trajectory of digital transformation in Indian healthcare.

### Challenges Addressed

Digital transformation in India's healthcare ecosystem has been constrained by limited penetration in non-metro regions, low digital health literacy among smaller providers, infrastructural fragmentation, and lack of regulatory clarity. Despite the establishment of platforms such as the Ayushman Bharat Digital Mission (ABDM), less than 10% of healthcare providers have aligned with its standards, indicating a significant compliance and awareness gap. A lack of interoperability, uneven standardization of digital tools, and the absence of financial or structural incentives have hindered meaningful progress.

Smaller hospitals and clinics often face disproportionate challenges due to limited resources and technical capabilities. Innovation efforts have remained concentrated among a few urban institutions, leaving large segments of the population without access to the benefits of digital health. Without strategic alignment between innovators, governments, and providers, the promise of digital equity remains unrealized.

### Key Discussion Points

- Digital transformation was reaffirmed as a non-negotiable requirement for healthcare scalability, particularly in the context of India's large and diverse population.
- Adoption of digital solutions in Tier 2 and Tier 3 cities was emphasized as a national priority, with initiatives such as the Digital Health Masterclass aimed at empowering smaller providers.

# Executive Summary

- Structured training programs and masterclasses, developed in partnership with organizations like QCI and Tech Mahindra, were cited as vital mechanisms for building digital competencies at the grassroots level.
- The Health Nexus Accelerator was recognized for advancing late-stage healthcare startups through cohort-based support, mentorship, and clinical validation in collaboration with leading academic and healthcare institutions.
- NATHEALTH's Patient Safety Initiative was presented as a parallel stream reinforcing digital adoption with a focus on improving care standards through awareness campaigns, white papers, and institutional awards.
- Stakeholder alignment was highlighted as essential to overcoming fragmentation, with a need for closer collaboration among startups, hospitals, government agencies, and insurers.
- The Ayushman Bharat Digital Mission (ABDM) framework was cited as a foundational pillar, with tools such as ABHA numbers, the Healthcare Professional Registry (HPR), and digital health standards positioned as enablers of a unified system.
- Despite progress, digital adoption across institutions remained low, necessitating further capacity building, policy incentives, and integration with accreditation frameworks like NABH.
- It was emphasized that interoperability and data privacy standards must be strengthened to support system-level integration.
- A robust CSR strategy, focusing on healthcare access, affordability, and infrastructure, was discussed as a mechanism to scale digital health while addressing population-level needs.
- The role of digital health in enhancing accountability, transparency, and patient outcomes was stressed, particularly when linked with AI-powered diagnostics, real-time data analytics, and integrated health records.
- To support innovation at scale, funding and incubation were recommended for startups, especially those operating in health tech and AI.
- The panel underscored the importance of real-world testing environments, where clinical mentorship and operational integration ensure innovations are practical and scalable.
- Government and regulatory stakeholders were encouraged to facilitate simplified, transparent, and inclusive digital health standards, thereby enabling broader adoption across provider types and regions.

# Executive Summary

## Plenary Session 5: The Role of the National Health Claim Exchange (NHCX) in Digital Health Convergence

As healthcare financing in India undergoes rapid transformation, the National Health Claim Exchange (NHCX) has emerged as a cornerstone of the country's digital health convergence. Positioned under the Ayushman Bharat Digital Mission (ABDM), the NHCX is enabling automated, standardized, and transparent health insurance claims processing. This session explored how NHCX is redefining the insurance landscape by enhancing efficiency, lowering administrative costs, and supporting broader goals of universal health coverage. The role of insurance in driving affordability, resilience, and access to care was reaffirmed, with special attention given to the "missing middle"—those not covered by either government or private schemes.

### Challenges Addressed

Despite the transformative potential of NHCX, adoption across providers—particularly smaller hospitals and nursing homes—remains limited. Barriers such as lack of awareness, concerns about cost and data security, and insufficient integration support have slowed the transition. Fragmented claims processes, limited real-time tracking, and slow reimbursement cycles continue to challenge both insurers and providers. Inadequate coordination between stakeholders, a lack of incentives for digital claims, and minimal policyholder visibility further hinder scalability.

### Key Discussion Points

- As part of the Ayushman Bharat Digital Mission, NHCX was positioned as a foundational pillar of digital health infrastructure, driving interoperability, cost-efficiency, and seamless stakeholder communication.
- The shift toward real-time claims tracking and faster discharge processing was recognized as essential to improving hospital cash flow and easing financial burdens on patients.
- Barriers to adoption were noted, particularly among small and mid-sized healthcare providers, who remain hesitant due to unclear cost structures, technological complexity, and minimal training.
- Focus was placed on data privacy and governance, with recommendations for privacy-by-design frameworks and secure, controlled access systems.
- A need for industry-wide communication and awareness campaigns was identified to build trust in the system and demonstrate tangible benefits, especially to smaller players.
- NHCX was shown to support Third-Party Administrators (TPAs) in evolving from administrative entities into data-driven, strategic partners—enabling improved fraud prevention, faster processing, and personalized insurance models.

# Executive Summary

- Through structured collaboration, NATHEALTH was recognized as a key enabler in driving industry workshops, building awareness, and promoting stakeholder alignment around digital claims infrastructure.
- The discussion highlighted emerging opportunities for new insurance products, such as:
  - Parametric insurance for fixed payouts
  - On-demand OPD coverage
  - Usage-based models driven by lifestyle data
  - Predictive insurance frameworks using analytics
- Policy alignment and simplification were viewed as vital, particularly the removal of Aadhaar registration and integration with existing digital systems.

## **Panel Discussion – Accelerating Claims Digitization and Innovation Through NHCX**

The panel explored the transformative potential of the National Health Claims Exchange (NHCX) in reshaping India's health insurance ecosystem. Discussions centered on data privacy, security protocols, and the strategic shift toward auto-adjudication to lower claim processing costs. Emphasis was placed on new insurance product opportunities—such as parametric, usage-based, on-demand, and predictive insurance—enabled by real-time data exchange. Challenges around private provider onboarding, awareness, and value demonstration were highlighted, along with examples from global digital health exchanges.

Panelists underscored the importance of ecosystem-wide collaboration, co-development models, and pilot testing to strengthen stakeholder engagement. NATHEALTH was recognized as a potential anchor to drive these collaborations and create proof-of-concept pilots, especially to support smaller hospitals in digitization efforts. India's federated, privacy-by-design digital infrastructure was noted as a unique global model capable of encouraging innovation while ensuring trust, equity, and scalability in claims digitization.

## **Plenary Session 6: Igniting Medical Value Travel (MVT) and Building the Head in India Brand**

India's position as a global healthcare destination was revisited in this session with a focus on reimagining Medical Value Travel (MVT) as a comprehensive, patient-centric offering. While the country has historically benefitted from cost competitiveness and clinical excellence, the need for a structured national strategy to build the *Heal in India* brand was emphasized. Lessons from global leaders in MVT were considered to inform a cohesive and scalable roadmap for India's medical travel industry.

# Executive Summary

## Challenges Addressed

India's medical travel experience remains fragmented due to poor integration across healthcare, travel, hospitality, and government systems. The patient journey—beginning with visa application and ending with post-treatment recovery—often lacks cohesion. Limited awareness of India's healthcare offerings in high-value international markets, the absence of a unified brand narrative, and the lack of formal insurance portability continue to hinder India's potential. Additionally, most global accreditations recognized by international patients remain underutilized by Indian institutions, affecting trust and credibility.

## Key Discussion Points

- India's current value proposition in the MVT sector was recognized as cost-driven, but it was emphasized that long-term competitiveness must be based on quality, convenience, and holistic care.
- A central coordinating framework for the Heal in India brand was proposed to align stakeholders across ministries, hospitals, tourism boards, facilitators, and private providers.
- The newly launched MVT digital portal was seen as a step toward improving transparency and access for international patients.
- The integration of AVUSH-based therapies into post-treatment recovery plans was advocated.
- Strategic investment in global accreditation and quality benchmarking, including expansion of NABH and promotion of JCI certifications, was recommended.
- The need for collaborative governance models engaging the public and private sectors was emphasized to standardize care delivery and promote cohesive growth.
- Emphasis was placed on diversifying source markets, particularly targeting under-served but high-potential geographies such as Central Asia, West Africa, and Eastern Europe.
- It was recommended that India's healthcare strengths in tertiary care, robotics, transplant surgery, and recovery plans be actively promoted through unified storytelling and outcome-based marketing.
- Service delivery was suggested to be enhanced through concierge support, airport facilitation, translators, wellness packages, and post-care recovery lounges, creating a 360-degree patient experience.
- A tiered accreditation or star rating model combining clinical performance, infrastructure, patient feedback, and certification status was proposed to empower informed patient choice.
- The role of bilateral government agreements in facilitating visa liberalization, insurance portability, and structured referral pathways was explored as a sustainable avenue for long-term growth.

# Executive Summary

## Panel Discussion – Strengthening the ‘Heal in India’ Initiative: Next Steps for India

The discussion focused on the strategic imperatives required to position India as a leading global destination for medical value travel. Key themes included the critical role of the private sector in enhancing India’s MVT-readiness, the need for sustained policy support and incentive structures, and the importance of a unified national approach to global promotion under the ‘Heal in India’ brand. Speakers emphasized the value of targeted outreach in high-potential source markets and highlighted successful international case studies, including lessons from Japan and Southeast Asia. The need for cross-sectoral alignment—spanning healthcare, tourism, aviation, and policy—was underscored as essential to delivering a seamless patient journey. Greater investments in accreditation, digital access, and cultural integration services were recommended to improve patient trust and global competitiveness. The session reinforced that cohesive branding, stakeholder partnerships, and government facilitation will be key to elevating India’s profile in the global medical travel landscape.

## Health Nexus Accelerator Certification – Enabling Market-Ready Healthcare Innovation

The Health Nexus Accelerator Program celebrated its first cohort certification at the 11th Annual NATHEALTH Summit, marking a significant milestone for healthcare innovation in India. This joint NATHEALTH-IHFC initiative helps late-stage healthcare startups achieve market integration and scale through regulatory guidance, investor preparation, and operational strengthening. The certified startups—25 selected from over 100 applicants across MedTech, diagnostics, AI, telemedicine, and robotics—benefited from industry mentorship, knowledge modules by Athena Infonomics, and pilot opportunities including engagement with Marengo Asia Hospitals. With plans to expand certification to over 1,000 startups, this program establishes a national benchmark for healthcare venture development, reinforced by a new website offering resources for future participants.



# INAUGURAL SESSION



Viksit Bharat – Catalyzing Stronger  
Partnerships between Public and Private  
Sector - Building New Capacity &  
Efficiency in Healthcare



## Leaders Speak

### 'The healthcare sector carries a profound responsibility in nation-building'



#### Mr. Abhay Soi

President, NATHEALTH,  
Chairman and Managing Director,  
Max Healthcare Institute Limited

Achieving the national vision of Viksit Bharat fundamentally depends on ensuring good health for all citizens. The healthcare sector carries a profound responsibility in nation-building, with a clear mandate to deliver quality, affordable, and accessible healthcare to every Indian. This responsibility necessitates collective action and strategic partnerships between public and private stakeholders.

#### Infrastructure Expansion Imperative

The urgent need to expand healthcare and diagnostic facilities across all cities and towns in India stands as a top priority. Establishing new hospitals with high-end medical technology in every district requires sustainable development through viable Public-Private Partnership (PPP) models. These partnerships can effectively combine government investments with private sector expertise, creating a robust healthcare infrastructure nationwide.

#### Addressing Human Resource Challenges

The critical shortage of healthcare professionals presents a significant challenge to healthcare expansion. More doctors, nurses, and technicians with clinical skills are essential to staff the growing number of healthcare facilities. Recent budget proposals to add over 75,000 medical seats in the next five years, with 10,000 implemented in the current year, represent important steps toward addressing this gap.

#### Affordability Through Local Manufacturing

Locally manufactured medical devices and inexpensive generic medicines are crucial for ensuring quality healthcare delivery at affordable costs. India's position as the world's pharmaceutical factory creates opportunities for greater adoption of generic medicines, substantially reducing treatment costs and improving access for millions.



## **Health Insurance and Financial Protection**

The Ayushman Bharat scheme, launched in September 2018, stands as the world's largest public health insurance program, covering 500 million beneficiaries with Rs 5 lakh per family. This landmark initiative has made inpatient care accessible to millions previously unable to afford such services. The recent extension of coverage to all citizens above 70 years of age marks an important step toward universal healthcare coverage across India.

Health insurance penetration continues to increase rapidly, with more citizens seeking financial protection against medical emergencies. Cashless health insurance systems, where hospitals work seamlessly with insurers through digital exchanges, represent a critical advancement in healthcare accessibility and affordability.

## **Technology and Healthcare Transformation**

Embracing technology in healthcare delivery represents an imperative for modern healthcare systems. Digitally enabled smart hospitals, telemedicine centers, and applications of AI and big data can deliver world-class patient care even in remote areas, bridging geographical barriers to quality healthcare.

The Ayushman Bharat Digital Mission, launched in September 2021, leverages digital technologies to improve healthcare delivery, access, and outcomes. When fully implemented, this initiative will ensure equitable healthcare access, create unified digital infrastructure, and empower individuals with control over their healthcare data. Private hospitals must collaborate with ABDM to drive digital transformation throughout the healthcare ecosystem.

## **Medical Value Tourism Opportunity**

India occupies a significant position in the medical value tourism sector, attracting thousands of international patients seeking high-end treatments and complex procedures. This success stems from India's clinical expertise, technological advancement, absence of waiting times, and substantially lower costs compared to other global destinations. Building on this reputation requires expansion into new markets, improved clinical procedures and outcomes, and exceptional service experiences for international patients.

## **NATHEALTH's Leadership Role**

NATHEALTH continues to play a pivotal role in advocating for policy changes and addressing issues related to infrastructure expansion, healthcare innovations, medical technology, digital health, and medical value tourism. The organization's engagement with policymakers at state and national levels aims to improve ease of doing business by reducing regulatory compliance burdens.

NATHEALTH's leadership remains essential for driving transformation across healthcare enterprises nationwide, particularly in areas such as payor-provider alignment with insurance companies, medical technology expansion, digital health innovation, and medical value tourism promotion.





### **Moving Forward: A Collaborative Approach**

The summit catalyzes action by transforming rhetoric into reality, working to ensure quality healthcare becomes a universal right for every citizen. This gathering serves as a center of innovation where stakeholders collaborate to ideate, innovate, and inspire meaningful change in healthcare delivery.

The healthcare sector's priorities align directly with the national vision of Viksit Bharat, emphasizing collaboration between public and private sectors while highlighting the critical role of technology and innovation in transforming India's healthcare landscape. Through continued dialogue, strategic partnerships, and unwavering commitment to health equity, the path toward universal health coverage becomes increasingly achievable.



## Leaders Speak

### **‘There is an intrinsic connection between population health and economic prosperity’**



#### **Shri Jagat Prakash Nadda**

Hon'ble Health Minister,  
Ministry of Health & Family Welfare  
and Ministry of Chemicals &  
Fertilizers, Government of India

The 11th NATHEALTH Arogya Bharat Annual Summit was recognized as a critical dialogue platform, strategically organized shortly after the 2025-26 budget announcement that positioned healthcare as a priority sector. The summit's theme, 'Ideas to propel healthcare in India towards Viksit Bharat,' reflects its strategic positioning at the intersection of health, human capital, development, and economic growth—addressing a critical imperative for India's developmental journey.

#### **Transformative Healthcare Initiatives**

The transformative impact of initiatives launched under the visionary leadership of Hon'ble Prime Minister Shri Narendra Modi has reshaped India's healthcare landscape. Key programs including Ayushman Aarogya mandirs, Ayushman Bharat Pradhan Mantri Jan Arogya Yojana (PMJAY), and Ayushman Bharat Digital Mission (ABDM) have ushered in an era of digital and technological innovations. These initiatives have made healthcare delivery more accessible and equitable across the country, establishing new standards for healthcare access and quality.

#### **Healthcare as a Pillar of National Development**

The crucial relationship between healthcare advancements and national development establishes healthcare as a fundamental pillar in achieving the vision of Viksit Bharat. The synergy between improved productive technology and healthier citizens contributes significantly to accelerating economic growth, reducing inequality, and improving overall quality of life. This intrinsic connection between population health and economic prosperity underscores the strategic importance of healthcare investments.



### **Critical Themes for Healthcare Advancement**

The summit's focus on critical themes demonstrates a comprehensive approach to healthcare transformation. These key areas include:

- A.** Ease of doing business leading to infrastructure creation
- B.** Strengthening MedTech by developing domestic supply chains
- C.** Inclusivity and expanding access to healthcare services
- D.** Driving exports and medical tourism
- E.** Innovation solving India's unique health challenges

The deliberations during the summit are expected to generate a host of solutions addressing several key areas within the overall healthcare ecosystem, contributing meaningfully to the advancement of healthcare in India.

### **Collective Action Towards Viksit Bharat**

The importance of collective action in transforming India's healthcare landscape serves as a pathway to achieving Viksit Bharat. The summit represents an opportunity for stakeholders across the healthcare spectrum to collaborate, innovate, and implement solutions that will strengthen India's healthcare infrastructure while supporting broader national development goals.

The strategic focus on these interconnected themes reflects a holistic understanding of healthcare's role not merely as a service sector but as a fundamental driver of national prosperity and human development. Through sustained attention to these priorities, the healthcare sector can make substantial contributions to realizing the vision of a developed India by 2047.



## Leaders Speak

### ‘PPPs can access viability gap funding from the Government of India’



#### Shri Kiran Gitte

Secretary, GA (Good Governance) and Health and Family Welfare Department, Government of Tripura

The 11<sup>th</sup> Annual Aarogya Bharat Summit 2025 provided a platform to highlight Tripura's emergence as a strategic healthcare investment destination. The state, under the leadership of Chief Minister Dr. Manik Saha, an eminent maxillofacial surgeon, has prioritized healthcare development as a cornerstone of regional growth and development.

#### Tripura: Strategic Geography and Economic Profile

Tripura presents a unique geographic and demographic profile with significant development potential. The state has a population of 4 million (40 lakh) and shares 85 percent of its borders with Bangladesh, with additional borders with Assam and Mizoram. This positioning creates a strategic advantage for healthcare services with cross-border potential.

The state's economic trajectory shows remarkable progress, with the Gross State Domestic Product (GSDP) demonstrating consistent 10-12 percent annual growth, approaching 1 lakh crore rupees, comparable to Goa. Per capita income is nearing the national average—a significant achievement for a small, historically remote state. Improved connectivity now includes direct flights from Agartala to major metropolitan centers including Delhi, Hyderabad, Ahmedabad, Chennai, and Bangalore, facilitating medical tourism particularly from Bangladesh through Tripura.

#### Healthcare Market Potential

The healthcare catchment area for Tripura extends far beyond its borders, encompassing approximately 15 million people—4 million from Tripura, 2 million from lower Assam (particularly Silchar and Karimganj), and about 9 million from eastern Bangladesh. This substantial population base creates a significant demand for quality healthcare services.



Currently, 84% of hospital beds in Tripura are in the government sector, indicating an extraordinary opportunity for private healthcare investment. The state's healthcare infrastructure shows 1.2 hospital beds per thousand population, lower than other small states like Sikkim (2.3) and Goa (2.1). The private sector's contribution remains notably underdeveloped at less than 10% of total hospital beds, compared to the national average of approximately 60%.

### **Healthcare Education Infrastructure**

Tripura has developed a robust medical education foundation with 1,073 seats across various medical disciplines, including 400 MBBS seats with 100 more being added, over 100 MD/MS seats, and approximately 480 D.Pharm and B.Pharm seats, plus numerous nursing and allied health programs. This educational ecosystem provides a pipeline of healthcare professionals to support the expansion of services.

The state currently offers nine super specialties in government hospitals with some private facilities, primarily ILS Hospital, providing additional specialized care. Advancements in transplant services include kidney transplants already performed, with plans for liver and heart transplants in government facilities.

### **Government Support and Incentives**

The government offers extensive support for private healthcare investments in Tripura. Under the Unnati scheme for northeastern states, the health sector is categorized as an industry, eligible for capital subsidy, interest subvention, and state GST reimbursement. The Tripura Industrial Investment Promotion Incentive Scheme provides additional benefits including power subsidies.

Public-private partnerships (PPP) can access viability gap funding from the Government of India and is available at nominal lease rental rates (0.5 percent of government land value), with a recent example of 20 acres allocated to SIGA Group of Hospitals demonstrating this commitment.

Megaprojects with investments exceeding 100 crore rupees and employment potential of over 100 people receive customized incentives through the Investment Promotion Agency of Tripura, chaired by the Chief Minister. A notable example includes support provided to Indian Hotel Company Limited (Taj Group) for the Taj Pushpavanta Palace Hotel in Agartala, including approximately 40 crore rupees in subsidies, state GST reimbursement for 15 years, and additional incentives.

### **Flagship Healthcare Project Opportunity**

A strategic multi-super specialty hospital project is proposed for central Agartala. A 16-acre site, formerly a central jail relocated outside the city, has 5.74 acres specifically designated for this healthcare development. A tentative concept master plan has been developed, with the RFP planned for reissue in April.





The vision encompasses a 400-bed super specialty facility offering services not currently available in the state or region, with potential for phased development. The government stands ready to provide customized support based on specific investor requirements for this high-priority project.

### **Medical Tourism Potential**

Tripura offers substantial medical tourism opportunities, particularly from Bangladesh. Approximately 450,000 medical visas are issued annually to Bangladesh citizens, with 80 percent traveling via Agartala due to limited healthcare facilities in eastern Bangladesh. Additionally, many Tripura residents currently seek specialized treatments outside the state for cancer, ophthalmology, orthopedics, kidney, cardiac, and neurological care—representing immediate demand for expanded local services.

### **Health Insurance Market**

The state demonstrates strong implementation of government health insurance schemes. The Pradhan Mantri Jan Arogya Yojana (PMJAY) involves expenditure of approximately 250 crore rupees, with patients often traveling to other states due to limited in-state facilities. Additionally, the Chief Minister's Jan Arogya Yojana (CMJAY) covers the remaining 1.3 million people not included under PMJAY.

Both schemes provide coverage of 5 lakh rupees per annum per family without income limitations. The combined expenditure for these programs totals approximately 350 crore rupees, supplemented by private healthcare spending—creating a robust, funded market for quality healthcare services.

### **Invitation to Healthcare Investors**

Healthcare investors are invited to visit Tripura and explore the proposed hospital project, identified as one of the highest priorities for the Chief Minister. The developing healthcare ecosystem includes nursing colleges, pharmacy colleges, medical colleges, and a planned Ayurvedic college.

Visitors can experience the state's cultural and natural attractions, including a historic palace, Dumbur Lake, Buddhist sites, ancient rock reliefs, and the scenic Chabimura river—making a compelling case for a combined business and leisure exploration of this emerging healthcare frontier.



## Catalyzing Stronger Partnerships between Public and Private Sector Building new capacity & efficiency in healthcare

India's healthcare sector faces a dual challenge: improving accessibility while ensuring quality. Existing infrastructure gaps, particularly in rural areas, where inadequate healthcare facilities persist and the need for increased investment in primary healthcare centers and digital health solutions to bridge these gaps was underscored. The session welcomed experts from the field of healthcare, public health, technology, and policymakers who deliberated upon a roadmap to transition from being the world's pharmacy to a global leader in healthcare innovation, equitable health access, and medical excellence.

### The Role of Public-Private Partnerships (PPPs) in Healthcare Transformation

#### Strengthening Collaboration

Public-private partnerships have emerged as a vital strategy to address healthcare challenges. Successful models where government initiatives complement private sector efficiency result in improved patient outcomes. Collaboration between the government and private hospitals enhances treatment availability, particularly in specialized areas such as oncology and cardiology. A national framework for PPPs, with clear guidelines on roles and responsibilities, would make collaborations more effective and sustainable. Transparency in these partnerships, along with proper accountability mechanisms, fosters trust and long-term success.

#### Policy and Regulatory Framework

Regulatory hurdles often slow down healthcare advancements. Policy reforms must encourage innovation while ensuring patient safety and equitable access. A more agile regulatory environment would facilitate quicker approval processes for new treatments and technologies. India's health data protection laws need updating to keep pace with the increasing digitization of medical records. A balanced regulatory approach—promoting innovation while safeguarding patient rights—is key to fostering a sustainable healthcare system.





## Digital Health and Technology Integration

### Telemedicine and AI in Healthcare Delivery

Telemedicine expands healthcare access, and AI-driven diagnostics improve early disease detection. Telehealth is particularly beneficial for mental health services, allowing more people to seek professional help without logistical constraints. Wearable technology plays an important role in patient monitoring. The increasing adoption of smart health devices allows for real-time tracking of patient vitals, enabling early intervention and better disease management. These tools must integrate with India's broader healthcare infrastructure to ensure maximum effectiveness.

### Electronic Health Records (EHR) and Data Security

The adoption of electronic health records is a game-changer for integrated healthcare. However, data security and patient privacy concerns necessitate stronger regulatory frameworks and cybersecurity measures. Growing risks of cyberattacks targeting healthcare data highlight the need for stringent security protocols. India should develop a national standard for EHR systems to ensure interoperability between different healthcare providers. A unified digital health ecosystem would not only streamline operations but also improve patient care by enabling seamless data sharing across institutions.

## Universal Health Coverage and Financial Sustainability

### Insurance and Affordability

Expanding health insurance coverage remains a top priority. Strategies to enhance affordability include innovative insurance models and government subsidies for lower-income groups. Micro-insurance schemes tailored to rural populations are important, as is greater insurance literacy in India.

Risk-pooling mechanisms can help reduce costs for both insurers and patients. A hybrid insurance model that combines government backing with private sector efficiency would provide more comprehensive coverage.

### Cost Management and Efficiency

Ensuring cost-effectiveness in healthcare delivery is crucial. Value-based care models and better supply chain management reduce costs without compromising quality. Hospitals can reduce operational expenses through efficient procurement systems and lean management strategies.

## Innovations in Pharmaceuticals and Medical Devices

### Indigenous Manufacturing and Research

With India's growing role in global pharmaceuticals, fostering local research and manufacturing capabilities is essential. Incentives for domestic production and R&D investments are critical components for strengthening India's healthcare industry. A stronger biotech ecosystem in India benefits not only the local market but also positions the country as a global leader in healthcare innovation.



## Emerging Technologies and Personalized Medicine

Advances in precision medicine, biotechnology, and wearable health devices are reshaping patient care. Personalized medicine is an area of rapid advancement, with genomic sequencing becoming more affordable, allowing for customized treatments based on genetic profiles.

## Medical Value Tourism

India has emerged as a significant player in medical value tourism, attracting thousands of patients from hundreds of countries seeking high-end treatments and complex procedures. India's advantages include:

- Clinical expertise
- Technological progress
- No waiting times
- Low costs compared to global alternatives

India is the world's least expensive destination for world-class healthcare services and is globally acknowledged as a leader in medical value tourism.

## Future Prospects

Looking ahead, a long-term vision that fosters innovation, sustainability, and inclusivity in India's healthcare system is necessary. A multi-pronged approach, integrating policy reforms, digital health advancements, and strategic investments, will be critical in shaping a healthcare ecosystem that is both accessible and efficient. The role of emerging technologies, particularly artificial intelligence and precision medicine, will continue to expand, necessitating regulatory frameworks that promote ethical and effective implementation.

The session underscored the need for a multi-stakeholder approach to healthcare transformation, with government, private sector, and technological innovation playing pivotal roles. Strengthening healthcare infrastructure, adopting digital solutions, and fostering public-private collaborations will be essential in achieving a resilient and inclusive healthcare ecosystem in India.

*Stakeholders must commit to actionable strategies that drive tangible improvements in healthcare delivery, ensuring better health outcomes for all citizens.*



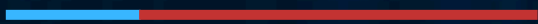
# Key Takeaways

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- **Improve** healthcare infrastructure, particularly in rural areas, through increased investment in primary healthcare centers and digital solutions.
  - **Enhance** accessibility by leveraging mobile healthcare units and community outreach programs for underserved populations.
  - **Address** workforce shortages by upskilling healthcare professionals and expanding medical education opportunities.
  - **Foster** the adoption of telemedicine and AI-driven diagnostics to bridge gaps in healthcare accessibility.
  - **Implement** incentive programs to encourage medical professionals to serve in rural and semi-urban regions.
  - **Develop** a national framework for public-private partnerships (PPPs) to strengthen healthcare collaborations.
  - **Facilitate** policy reforms that encourage innovation while maintaining patient safety and equitable access.
  - **Strengthen** data protection laws to ensure the security and privacy of electronic health records (EHR).
  - **Encourage** the use of wearable health devices for real-time monitoring and early disease detection.
  - **Revive** insurance coverage models by integrating micro-insurance and risk-pooling mechanisms to improve affordability.
  - **Optimize** healthcare cost management through value-based care models and improved supply chain efficiency.
  - **Support** indigenous pharmaceutical research and manufacturing to position India as a global leader in healthcare innovation.
  - **Advance** the adoption of precision medicine and biotechnology for more personalized patient care.
  - **Ensure** sustainable healthcare development through strategic investments in digital health and emerging technologies.
- 



# PLENARY SESSION



A New Look at Healthcare Compliances in India and ways to accelerate sectorial momentum while ensuring adherence

KNOWLEDGE  
PARTNER



## Leaders Speak

### 'Approximately 60% of the healthcare regulation landscape is decentralized'



#### Ms. Ameera Shah

Senior Vice President, NATHEALTH  
Promoter and Executive Chairperson,  
Metropolis Healthcare

The healthcare sector faces a complex regulatory landscape that significantly impacts operational efficiency and service delivery. This complexity stems from the dual nature of regulation across different healthcare segments—hospitals experience extensive regulation at both state and central levels, while the diagnostic sector operates with minimal standardized oversight. This dichotomy necessitates a segmented approach to regulatory reform that addresses the specific needs of each industry component.

#### Current Regulatory Environment

Healthcare stands as one of the most heavily regulated sectors, particularly for hospitals, with a regulatory framework often characterized as fragmented and challenging to navigate. The regulatory structure encompasses both clinical requirements and non-clinical elements including labor, finance, and environmental management.

Approximately 60% of the healthcare regulation landscape is decentralized, with various requirements enforced by bodies at state and municipal levels. This decentralization creates implementation challenges, as evidenced during the COVID-19 pandemic when diagnostic services required registration at the municipal level in each city.

The regulatory framework comprises over 440 regulations affecting the healthcare sector, leading to inconsistent practices across regions, duplication of efforts, and confusion regarding compliance requirements. This complexity is compounded by the fact that 25-30% of regulations undergo modifications annually—ranging from minor form template updates to major legislative restructuring—with some implementations dependent on local inspector discretion. These factors contribute to operational delays, increased costs, and potentially reduced patient access to vital services.



### **Limited Compliance Scope**

A significant concern is that compliance with these extensive regulations is primarily observed only within the organized healthcare sector, which represents less than 15% of the industry. This raises critical questions about regulatory adherence across the remaining 85% of healthcare providers.

### **Government Initiatives and Industry Impact**

Recent government efforts to simplify the regulatory landscape have included rationalizing redundant regulations, advancing digitization, implementing single-window clearances, and decriminalizing minor procedural defaults. While these initiatives have benefited the industry, the persistent complexity of the regulatory framework still requires healthcare providers to allocate approximately 1-1.5% of annual revenue toward maintaining compliance.

### **NATHEALTH's Initiative**

NATHEALTH has undertaken a strategic initiative to identify industry bottlenecks and determine necessary reforms for sector evolution. This effort brings together representatives from hospitals, medical technology, and diagnostics to provide insights on regulatory harmonization, compliance simplification, and innovation promotion.

The initiative aims to enhance service delivery while simultaneously improving innovation and attracting investment to increase funding and growth opportunities. The approach includes examining international models of simplified regulatory processes to inform potential directions for India's healthcare regulatory framework.

This collaborative effort between private and public stakeholders represents a significant opportunity to address complex regulatory challenges and establish a more conducive environment for healthcare advancement while maintaining essential quality and safety standards.



## Leaders Speak

### 'The current national environment presents a unique opportunity for healthcare regulatory reform'



#### Dr. Vinod K Paul

Hon'ble Member (Health), NITI Aayog

The current national environment presents a unique opportunity for healthcare regulatory reform, aligned with broader governmental initiatives focused on deregulation and ease of doing business. Recent developments, including the economic survey's strong pitch for business deregulation, the Prime Minister's announcement of a deregulation commission, and the upcoming Jan Vishwas 2.0 initiative, create a favorable context for systematic regulatory improvements in the healthcare sector.

#### Building on Existing Foundations

NATHEALTH's systematic work over the past 16-17 months has positioned the healthcare sector advantageously in this reform landscape. The existing blueprint developed through collaborative efforts between public and private stakeholders provides a valuable foundation for further action. This preparation aligns with the national vision of Viksit Bharat 2047 and enables the sector to build upon an established narrative for regulatory improvement.

#### Unique Characteristics of Healthcare Regulation

Healthcare regulation must acknowledge several distinctive aspects of the sector that differentiate it from other industries:

- **Patient-Centric Approach:** The clinical interests of patients remain paramount, with all regulatory frameworks needing to prioritize patient safety, trust, and positive outcomes.
- **Universal Service Provision:** Healthcare serves all demographic segments "from womb to tomb," requiring regulatory considerations that account for this universality and diverse service populations.
- **Protection Against Exploitation:** Regulatory measures must address unique vulnerabilities in healthcare transactions where information asymmetry creates potential for exploitation.

- **Ethical Dimensions:** Healthcare operates within distinct ethical frameworks governing various professions (doctors, nurses, allied health professionals) that connect with but extend beyond legal requirements.
- **Business Operations:** Standard business regulations related to buildings, financing, electricity, and fire safety apply alongside healthcare-specific requirements.



### Priority Action Areas

To advance regulatory reform effectively, several key approaches are recommended:

- **International Benchmarking:** Detailed examination of relevant international regulatory models to inform India's approach, ensuring that frameworks like the Clinical Establishment Act incorporate global best practices.
- **Differentiated Approach by Scale:** Disaggregation of regulatory challenges facing small healthcare facilities versus large institutions to develop appropriately tailored solutions.
- **Jurisdictional Analysis:** Clear delineation between local, state, and union government regulatory responsibilities to address issues at appropriate governance levels.
- **Legislation-Specific Reform:** In-depth analysis of specific acts including Pre-Conception and Pre-Natal Diagnostic Techniques (PCPNDT) Act, Clinical Establishment Act, and others, with balanced stakeholder input to develop nuanced reforms.
- **Technological Solutions:** Exploration of technological approaches to address regulatory challenges, such as digital solutions for PCPNDT Act compliance while maintaining its core gender equality objectives.
- **Consistent Engagement:** Maintain momentum through regular reporting, established milestones, and sustained collaboration between public and private stakeholders.
- **Detailed Documentation:** Development of comprehensive, specific proposals with exact language and implementation pathways to facilitate effective policy change.

### Immediate Opportunities

The current revision of the Drugs, Devices and Cosmetics Act presents an immediate opportunity for regulatory improvement in the medical device sector. Additionally, digital signature requirements and the implementation of single-window clearance systems represent areas where targeted reforms could yield significant benefits

### Collaborative Path Forward

NITI Aayog welcomes the formation of working groups focusing on different regulatory areas, with commitment to dedicated engagement and inclusion of diverse stakeholders in the reform process. This collaborative approach aims to leverage the current favorable policy environment to achieve meaningful regulatory improvements that enhance healthcare access, affordability, and quality while maintaining essential protections.





## Leaders Speak

### ‘The path forward requires shared understanding and internalization of outcome-based priorities’



#### Mr. Rajib Sen

Senior Adviser (Health), NITI Aayog

The regulatory environment in healthcare requires examination through a holistic lens that considers both structural challenges and fundamental mindset orientations. This study undertaken by NATHEALTH and EY represents an important contribution to understanding these dynamics across the healthcare sector.

#### Regulation as a Mindset Issue

Regulation fundamentally reflects prevailing mindsets, and its historical evolution demonstrates the critical role of perspective and approach. In a complex federal structure where health is a state subject, imposing uniformity across all states is neither feasible nor necessarily desirable. This complexity demands a different approach centered on design principles.

#### Outcome-Focused Design Approach

The key to effective regulatory reform lies in focusing consistently on desired outcomes rather than procedural mechanisms. From a governmental perspective, these outcomes are clearly defined as:

- Accessibility to healthcare
- Affordability of healthcare services
- Quality of healthcare provision

When all stakeholders—private sector, public sector, state and central authorities—align their regulatory approaches toward advancing these three core objectives, the process of creating and implementing regulations becomes more coherent and purpose-driven.

#### Balancing Competing Policy Objectives

The healthcare sector frequently encounters tensions between different policy objectives that require thoughtful reconciliation.





A notable example is the "Make in India" initiative introduced in 2017, which prohibits importing products generically available in India. While this policy has merit for economic development, its application in healthcare raises critical concerns where domestically produced equipment may not meet necessary quality standards.

This creates an apparent conflict between promoting domestic manufacturing and ensuring medical safety. The resolution lies in prioritization based on sector-specific considerations—for the medical sector, safety considerations must take precedence over import substitution objectives when the two come into conflict.

### **Establishing Priority Frameworks**

For effective regulatory reform, stakeholders must establish clear prioritization frameworks that guide decision-making across various regulatory domains. By focusing first on desired outcomes (accessibility, affordability, quality) and then determining implementation approaches, the regulatory process can avoid circular debates about fundamental objectives.

### **Current Reform Initiatives**

Various regulatory reform efforts are currently underway, including significant decriminalization of laws and a high-level initiative at the Cabinet Secretary level to identify laws requiring simplification across states. NITI Aayog is participating in this effort to develop state-wise documentation of priority items requiring regulatory attention.

Many healthcare regulations overlap with those affecting other sectors, such as building laws applicable to hospitals and other establishments. Addressing these common regulatory challenges through a unified, outcome-oriented approach could significantly streamline compliance requirements while preserving essential protections.

The path forward requires shared understanding and internalization of outcome-based priorities among all stakeholders to simplify regulatory processes while maintaining focus on the core objectives of accessible, affordable, and quality healthcare.



# Panel Discussion

## MODERATOR:

Ms. Anisha Nair Dhawan

## EXPERTS:

- **Ms. Ameera Shah**, Senior Vice President, NATHEALTH and Promoter and Executive Chairperson, Metropolis Healthcare (Session Chair)
- **Mr. Rajib Sen**, Senior Advisor (Health), NITI Aayog
- **Dr. Vinod K. Paul**, Honorable Member (Health), NITI Aayog
- **Mr. Tarun Pandey**, Partner Business Consulting, EY Global Compliance Management
- **Mr. Varun Khanna**, Co-chair, NATHEALTH Provider Forum and Group MD Quality Care India Ltd
- **Mr. Sanjeev Vashishta**, Co-chair, NATHEALTH Northern Region - and MD Pathkind Diagnostics Pvt. Ltd.
- **Mr. Chaitanya Sarawate**, Governing Council Member, NATHEALTH and President and CEO India and South Asia GE Healthcare SA





## Key Issue: The Current Compliance Landscape



**Mr. Tarun Pandey**  
Partner Business Consulting,  
EY Global Compliance Management



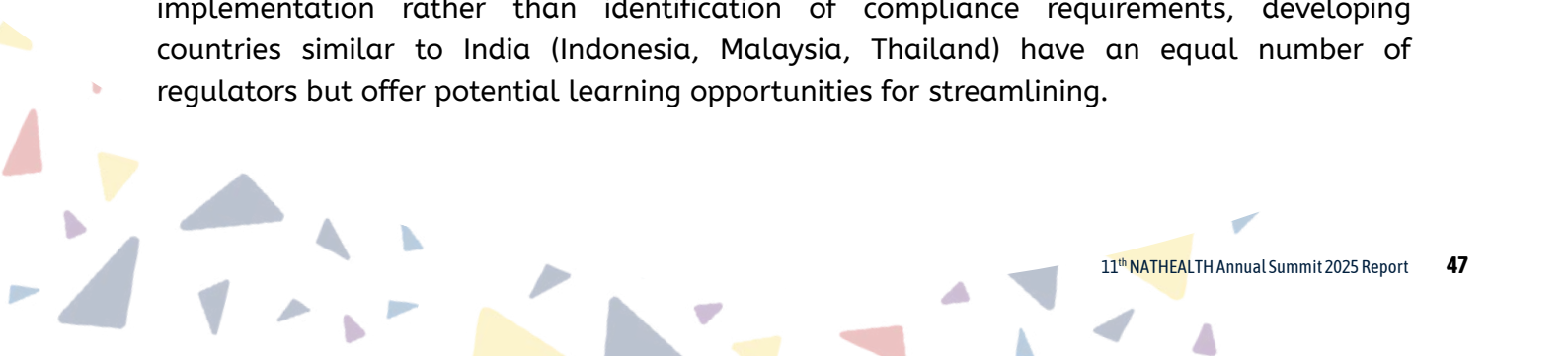
**Mr. Sanjeev Vashishta**  
Co-chair, NATHEALTH Northern Region  
and MD Pathkind Diagnostics Pvt. Ltd.

### Scale, Consistency and Complexity of Compliance Requirements

The healthcare sector in India faces an overwhelming regulatory environment:

- Companies Act Section 134(5) makes it mandatory for organizational leaders to confirm compliance with numerous requirements, creating substantial legal exposure. A single hospital in one state must comply with approximately 6,500 compliance requirements annually.
- 75% of these compliances are high-risk in nature, potentially resulting in work stoppage, significant penalties, or even closure.
- 25-30% of these compliances change every year, making continuous compliance challenging.
- Across 15 states, healthcare providers must navigate 443 different regulations and over 29,000 compliance requirements.
- The sector requires approximately 1,400 licenses, approvals, and registrations from multiple sources.
- The time required for regulatory approvals presents another significant challenge. Approval for an ultrasound machine can take anywhere from 3 months to 3 years, creating substantial operational disruptions. The lack of maximum timeframes for approvals introduces significant uncertainty into business planning and service delivery.
- Several contradictions exist within the current regulatory framework. For example, while the central government defines making services accessible under the PCPNDT Act and allows portable ultrasounds, some states like Gujarat and Karnataka prohibit them—making it difficult to provide services in smaller towns.
- Another contradiction involves digital signatures. The Information Technology Act legally recognizes digital signatures, and the Medical Council of India (MCI) accepts them for telemedicine practices. However, the same MCI requires physical presence and signatures for laboratory reports (radiology or pathology).

While developed countries like the US, Singapore, and European nations focus on implementation rather than identification of compliance requirements, developing countries similar to India (Indonesia, Malaysia, Thailand) have an equal number of regulators but offer potential learning opportunities for streamlining.



## Meeting challenges - Inconsistent Implementation Across States



**Mr. Varun Khanna**

Co-chair, NATHEALTH Provider Forum  
and Group MD, Quality Care India



**Mr. Chaitanya Sarawate**

Governing Council Member NATHEALTH and President  
and CEO, India and South Asia GE Healthcare SA

A major challenge highlighted is the inconsistent implementation of central acts across different states. The Pre-Conception and Pre-Natal Diagnostic Techniques (PCPNDT) Act exemplifies this issue. While it's a central government enactment, its implementation varies substantially across states—changing in "color, shape, creed, and substance." This creates particular difficulty for organizations operating across multiple states, who must navigate different documentation requirements and approval processes in each location.

The Clinical Establishment Act presents similar challenges. While 12 states and six union territories have adopted it, about 16 states and one union territory have their healthcare delivery legislation. Even within states that have adopted the Act, interpretation varies significantly. Some states require labs to be registered, while others mandate registration of collection centers (merely bleeding stations). Some states require annual renewal of registration while others do not.

### Fragmentation and Decentralization

Nearly 60% of the healthcare regulation landscape is decentralized, with various requirements enforced by bodies at state and municipal levels. The sheer volume and complexity of regulations often lead to inconsistent practices across regions, duplication of efforts, and confusion around compliance requirements. Each year, 25-30% of regulations undergo modifications, ranging from minor template updates to major legislative overhauls. Some implementations are discretionary, depending on local inspectors, resulting in delays, increased costs, and reduced access to vital patient services.

The complexity of the regulatory framework results in the industry incurring between 1-1.5% of annual revenue to maintain compliance. This financial burden affects operational efficiency, innovation potential, and ultimately patient care. Moreover, these compliance requirements are primarily adhered to by the organized sector, which constitutes less than 15% of the overall healthcare industry in India, raising questions about compliance in the remaining 85%.

## Sector-Specific Challenges Today

### Hospital Sector Challenges

The hospital sector faces significant pre-construction and setup delays with the gap between land acquisition and construction commencement typically ranging from 8-13 months. Before hospital construction can begin, 28 separate compliances are required. The approval processes suffer from subjectivity and lack of digitization, creating inefficiencies, while excessive documentation requirements burden both applicants and reviewing officers. Once operational, hospitals face a dichotomy between clinical outcome requirements and administrative compliances, with a disproportionate focus on administrative compliance over patient outcomes. The sector must navigate multiple regulators at state and central levels for the same facilities, such as blood banks. Many compliance requirements are outdated and fail to reflect technological advancements, leading to high resource deployment for compliance management.

### Medical Technology Sector Challenges

The medical technology sector confronts regulatory fragmentation based on risk classifications. Different risk classifications (Class A, B, C, D) are overseen by different regulators, with Class C and D devices regulated by central CDSO while Class A and B by state authorities. This results in different approval durations based on classification, and identical factories producing different class devices become subject to multiple regulatory inspections.


The multiplicity of regulators presents another challenge, with multiple ministries overseeing medical devices. These include the Central Drugs Standard Control Organization (CDSCO), Atomic Energy Regulatory Board (AERB) for X-ray emitting devices, Ministry of Environment and Forest Affairs, and other ministries with overlapping jurisdictions. The regulations across these ministries are often non-overlapping and differently interpreted.

Quality control orders from different ministries further complicate compliance, with approximately 1,700 different compliances stemming from various quality control orders. Industry players struggle with tracking and ensuring compliance with all requirements, and additional orders are anticipated in the future.

Export-oriented medical device manufacturers face duplicate regulation for export-only medical devices. CDSCO approval is required even for products exclusively meant for export, and there is a lack of mutual recognition of international standards.

### Diagnostic Sector Challenges

The diagnostic sector experiences a regulatory paradox in which regulations are unevenly applied between organized and unorganized sectors. The organized sector, estimated at only 15% of the industry, bears the full compliance burden while enforcement in the unorganized sector remains limited. Quality and standardization issues plague the sector with a lack of uniform standards across geographical areas and insufficient regulations ensuring accuracy and reproducibility of test results. There is inadequate protection against patient exploitation through overprescribing or overcharging, which contributes to limited trust and credibility in the healthcare system.



Workforce qualification concerns represent another significant challenge. Approximately 200,000–300,000 labs exist nationally, mostly in the unorganized sector, but only about 30,000 qualified pathologists, microbiologists, or biochemists are available. Less than 10% of labs have properly qualified doctors signing reports.

## Potential Solutions and Recommendations

- **Single Window Clearance System**

There is a pronounced need for a single window clearance system where all state and central government agencies can interface with healthcare organizations. As noted during the discussion, 32 ministries in 29 states and Union Territories are already on such a platform, but healthcare remains absent from this system. This single-window approach would enable transparent communication, streamlined approvals, and clearer guidance. It would be particularly beneficial for organizations operating across multiple states, reducing the need to navigate different systems and requirements in each location.

- **Patient-Centric Regulatory Framework**

Compliance requirements should be restructured to focus primarily on patient safety and outcomes rather than administrative procedures. Outdated requirements that don't reflect current technological capabilities should be eliminated, and greater emphasis should be placed on clinical outcomes over administrative procedures.

- **Streamlining Medical Device Regulation**

Consolidating regulatory oversight would reduce the multiplicity of regulators currently overseeing the medical device industry. Quality control orders across ministries should be harmonized to reduce confusion and duplication. Implementing mutual recognition of international standards for devices already approved in stringent regulatory jurisdictions would accelerate market access while maintaining safety standards. Duplicate regulation for export-only medical devices should be eliminated to enhance India's competitiveness in global markets.

- **Balancing Quality and Access**

New regulatory approaches should focus on ensuring quality while promoting accessibility and affordability. Implementing standardized quality benchmarks (ISO, CLIA, NABL, NABH, FDA, WHO) across geographical regions would create consistency while strengthening enforcement mechanisms in the unorganized sector would level the playing field.

- **Modernization of Compliance Systems**

Accelerating the digitization of compliance processes would reduce paperwork and administrative burdens. Implementing tracking systems for license applications would create transparency and accountability, while digital documentation would streamline record-keeping and verification processes.



- **Risk-Based Regulatory Approach**

A key recommendation from the med-tech industry perspective involves adopting a risk-stratified approach to compliance. This would categorize regulations based on risk levels, with some requiring only self-certification or affidavits, others needing audits, and high-risk areas requiring pre-approval. This approach should be developed consultatively between industry and government institutions.

- **Technology Leverage and Interoperability**

The discussion highlighted the importance of leveraging technology and digitization to transform regulatory compliance. Interoperability between systems should be a priority, with a national single-window reporting system replacing state-specific requirements. The Ayushman Bharat Digital Mission (ABDM) was specifically mentioned as a positive development that should be extended to create interoperability between hospitals, diagnostic companies, and insurance providers.

- **Transparency and Deemed Approvals**

Increased transparency in the regulatory process emerged as another priority. When applications are rejected, detailed explanations should be provided to help organizations address issues. The concept of "deemed approval" after a certain timeframe was proposed as a mechanism to prevent indefinite delays. While not suggested as a permanent solution, this approach could create pressure on both sides to adhere to reasonable timelines.

- **Support for Small Organizations**

The discussion acknowledged that while large organizations may have dedicated compliance teams, smaller healthcare providers often struggle to understand and meet regulatory requirements. Regular publication of FAQs and guidance documents would help smaller organizations navigate the complex regulatory landscape. This is particularly important given that smaller facilities contribute significantly to India's hospital bed capacity, including under the Pradhan Mantri Jan Arogya Yojana (PMJAY).

- **Five-Year Regulatory Roadmap**

Creating a clear five-year roadmap for regulatory evolution would help organizations plan effectively. Similar approaches have been successful in other industries like automotive and financial services. This roadmap would outline the desired future state of healthcare regulation and provide a path for industry and regulators to work together toward that vision.



## Future Prospects: Industry Structure and Regulatory Balance

The session highlighted the critical need for regulatory reform in India's healthcare sector to support its growth and ensure patient access to quality care. Through collaborative efforts focused on streamlining regulations, adopting risk-based approaches, leveraging technology, and maintaining an unwavering focus on patient outcomes, India can develop a world-class regulatory framework that supports healthcare delivery while ensuring quality and safety. This reform process will be essential to achieving the vision of Viksit Bharat 2047 with a robust, accessible healthcare system serving all citizens.

The vision should be to transition from asking "what compliances are required?" to "how can these compliances be implemented effectively?" This shift would align India's regulatory approach with global best practices while addressing the unique challenges of its healthcare landscape.

## Path Forward: Collaborative Action Plan

The session concluded with a specific action plan for collaborative reform efforts:

1. Analyze international regulatory best practices to inform India's approach
2. Disaggregate regulatory challenges by facility size to address both large and small provider concerns
3. Map regulations by government level (local, state, central) to target reform efforts appropriately
4. Conduct in-depth analysis of specific acts (PCPNDT, Clinical Establishment, etc.) to develop balanced reform proposals
5. Establish working groups for different regulatory areas with both industry and government participation
6. Develop detailed, specific recommendations rather than general principles
7. Maintain momentum through consistent reporting and milestone tracking
8. Leverage current reform opportunities, including revisions to the Drugs, Devices and Cosmetics Act



# Key Takeaways

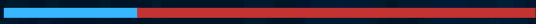
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- **Streamline** regulatory approval processes to reduce delays in drug and medical device approvals while maintaining safety standards.
- **Implement** digital tracking mechanisms for regulatory approvals to enhance transparency and efficiency.
- **Balance** drug pricing regulations to ensure affordability without discouraging investment in research and innovation.
- **Enhance** telemedicine infrastructure, particularly in rural areas, to improve healthcare accessibility.
- **Regulate** AI-driven healthcare solutions to address concerns around data privacy, algorithmic biases, and accuracy.
- **Integrate** digital health records across systems to improve interoperability and eliminate redundant diagnostics.
- **Expand** modular healthcare units in underserved regions to reduce patient travel time and enhance accessibility.
- **Develop** innovative financing solutions, such as public-private partnerships and investment funds, to strengthen healthcare infrastructure.
- **Encourage** private insurance expansion and streamline government insurance claim processing for better financial protection.
- **Strengthen** the domestic medical supply chain to reduce dependency on global suppliers and mitigate shortages.
- **Adopt** blockchain technology for supply chain transparency to combat counterfeit medicines and improve tracking.
- **Facilitate** collaboration between policymakers, healthcare providers, and technology firms to drive sustainable healthcare advancements.





# PLENARY SESSION



Realizing the full potential of MedTech  
Industry in India 2.0

KNOWLEDGE  
PARTNER



# Leaders Speak

## ‘Innovate, create trust, and stay grounded for a better future’



### Shri C.K. Mishra

Former Health Secretary and Former Secretary Environment, Forest and Climate Change, Government of India

#### Why MedTech Matters Now

Certain critical questions regarding the rising importance of MedTech in India's healthcare delivery system need to be examined. The effective and appropriate use of MedTech, as well as the creation of a surge in the industry in fulfilling the domestic demand and capturing the export market, needs to be highlighted. Three guiding questions inform the thematic approach:

1. Why has MedTech gained such significance?
2. Is it being used effectively and appropriately?
3. What must be done to propel domestic and export-led growth?

#### Designing for the New India

The shift of doctors and technologies from metros to smaller cities is evidence of a changing healthcare landscape. MedTech must evolve in tandem—rethinking product design, accessibility, and usability in underserved areas. While technology is now healthcare's biggest enabler, there must be caution against viewing it as a substitute for care. It is imperative to find a middle path, where MedTech becomes a bridge between provider and patient, enabling reach and empathy.

#### What the Industry Needs

- **Appropriate Government Policy:** Not necessarily fiscal incentives (which are unsustainable), but strong ecosystems that foster industrial growth.
- **Innovation:** Seen as the ultimate differentiator and expansion driver.
- **Regulatory Reform:** A transparent, time-bound, globally harmonized framework is essential. The regulator must be viewed as a caretaker, not merely an enforcer.

**Filling the Critical Gaps:** MedTech's success in filling the critical gaps in terms of human resource capacity and provisioning to help achieve crucial goals is noted. Emphasis is placed on the overbearing importance of digital healthcare for achieving the necessary goals in the last-mile delivery of healthcare in India. The need for more digital infrastructure at the point-of-care delivery systems is highlighted to remain accessible to the common man and ensure industry survival.



**Importance of Affordability and Optimal Pricing:** Affordability is pivotal to the effective application of MedTech solutions. Although high production costs persist, pricing strategies must account for the purchasing capacity of populations in Tier 2 and Tier 3 cities to ensure broader adoption and industry viability. Solutions must align with actual healthcare needs rather than being driven solely by technological advancement. Achieving a balance in treatment costs is necessary to promote access, affordability, quality, and equity across the system. Pricing models must consider demand patterns in smaller cities, which play an increasingly significant role in healthcare distribution.

**Role of Technology:** There is a need to find a middle ground to enhance the ability and capability of medical delivery services which does not amount to replacement of the human touch. The role of technology is identified as the enabler of the delivery process.

**Tools for Success:** In addition to government policies, innovation and the streamlining of the regulatory framework are pegged as critical aspects in the promotion of the industry. Predictability in policy, pricing, and procurement systems is stressed as the key to a successful regulatory system along with a regulator that will nurture the growth of the sector and help it establish itself in the ground.



## Leaders Speak

### 'GeM signals a promising future for public procurement in the medical technology space'



#### Mrs. Roli Khare

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Deputy CEO,  
Government e-Marketplace (GeM)

The Government e-Marketplace (GeM) has emerged as a transformative force in public procurement, particularly in the medical devices sector. With over 1,200 dedicated categories, the platform supports a wide spectrum of products, with each category hosting an average of 200 to 300 sellers. In top-performing segments, seller counts go up to 3,000–4,000, contributing to a transaction value of nearly ₹5,000 crore. This scale reflects the growing maturity and trust in GeM as a procurement platform.

#### Enhancing Buyer Capabilities and Reducing Information Asymmetry

GeM has brought about a significant shift in how government buyers engage with procurement. Traditionally, tender documents were drafted manually, often with gaps in technical specifications or regulatory compliance. Today, GeM offers pre-structured templates that incorporate thorough research, regulatory mandates, and relevant Indian Standards. This ready-to-use framework ensures that buyers, even with limited technical knowledge, can initiate compliant and transparent procurement processes. Built-in features like direct purchase options, reverse auctions, and real-time order tracking further empower buyers with tools that were previously unavailable.

#### Unlocking New Markets for Sellers

From the seller's perspective, GeM provides unprecedented market access. A small manufacturer from one region can now seamlessly supply to a remote health center in another part of the country. The portal's trust-based model streamlines onboarding, while payment integration ensures timely transactions, fostering greater confidence among sellers. Additionally, the vendor assessment framework offers an optional route to enhance credibility and visibility within the system.

## Leaders Speak

### 'India should accelerate innovation through Policy, Infrastructure, and Investment'



#### Dr. Rana Mehta

Partner and Leader, Healthcare,  
PwC India

A central question in the healthcare industry is to assess how India can make its vision of accessible and high-quality healthcare truly tangible – a commitment that previously lacked a concrete, implementable strategy and ultimately remained unfulfilled. Examining the pressing need to transition from aspirational targets to structured, outcome-driven planning is crucial at this stage.

#### **Evolving Ecosystem and Economic Opportunity**

Healthcare in India is undergoing a spatial and structural shift. It is no longer confined to the boundaries of urban conglomerates but is steadily moving toward underserved areas. We must pay attention to new opportunities for the healthcare sector, particularly MedTech, to contribute significantly to the national economy. Compare: the agriculture sector, which employs 42% of the population but contributes only 8% to GDP, with the software sector which contributes the same share to GDP with a much smaller workforce. India exported more software last year than Saudi Arabia did oil, underscoring the potential of high-value sectors. This context sets the stage for MedTech's projected growth into a \$30 billion industry by 2030.

#### **Changing Nature of Intervention and Accessibility**

Medical interventions have evolved significantly. Conditions like stroke, once treated with a passive “wait and watch” approach, now see active intervention that can significantly reduce morbidity and mortality. However, this shift comes with a cost. The challenge is to ensure that such advancements remain affordable and accessible to the wider population. Low per capita usage of MedTech in India remains a concern, emphasizing the need for greater penetration and usage in cost-effective ways.



### **Demographic Imperative**

India often views its young population as a demographic dividend, but the cautionary note today is that this window may be narrowing. Within the next five years, one in five Indians will be over the age of 60. This raises a critical question: will India become wealthy before it becomes old, or will it grow old before it becomes rich? The answer hinges on how the healthcare system evolves to promote longevity and well-being in an aging population.

### **Policy Evolution and Role of the State**

One of the major shifts in the past decade is the government's transition from being merely a provider of healthcare (by building hospitals) to becoming a payer (through schemes like insurance). This change alters the landscape for MedTech, positioning it as a key player in a more market-driven and outcomes-based healthcare system. The role of MedTech must now align with this evolving financing model to create scalable and sustainable solutions.

### **Fostering Innovation and Regulatory Clarity**

The importance of building a thriving ecosystem for MedTech innovation is highlighted as a national priority. The need for predictable regulatory frameworks that support startups, promote innovation, and create an environment akin to a “Silicon Valley” for MedTech in India is clear. The interplay between innovation, regulation, and industry development must be carefully managed to maximize growth.

### **Outcome-Driven Measurement**

Beyond services and product volumes, there is an urgent need to measure success by health outcomes. This will be a critical building block of a truly Viksit Bharat—a developed India where healthcare becomes not only a service but a measurable driver of quality life and national progress.



## Leaders Speak

### ‘Utilize MedTech regulation as an enabler, not an obstacle’



**Dr. Rajeev Singh  
Raghuvanshi**

Drugs Controller General of India,  
Central Drugs Standard Control  
Organization (CDSCO), Government of  
India

India’s medical device regulatory framework is undergoing a transformative shift—both in structure and spirit. With the Central Drugs Standard Control Organization (CDSCO) taking a more proactive role, the focus is gradually moving from oversight to partnership, from control to collaboration.

#### **Shifting the Balance from Imports to Manufacturing**

India’s \$13.5 billion medical technology market remains heavily dependent on imports, with 75–80% of products sourced internationally. The government aims to reverse this ratio in favor of domestic manufacturing, targeting an 80:20 split over the next five to seven years. This ambitious but realistic timeline is being supported through regulatory restructuring, policy interventions, and incentive schemes designed to nurture a homegrown manufacturing base.

#### **Regulation as a Catalyst for Growth**

Contrary to the belief that regulation stifles growth, India’s evolving regulatory framework is designed to facilitate global legitimacy and sustainable exports. With full-scale regulation introduced just over a year ago, early friction is understandable—much of it rooted in resistance to change. However, regulation ensures quality, safety, and traceability, helping Indian products gain global credibility. It is a means to build a structured, consistent pathway to competitiveness, not merely a compliance burden.

#### **Early Results and Institutional Support**

Progress on the ground is encouraging. CDSCO has issued nearly 3,900 manufacturing and 10,500 import licenses for medical devices, including over 1,000 high-risk Class C and D manufacturing licenses. In-vitro diagnostics (IVDs) have seen similar growth. To support this expansion, CDSCO has created a dedicated vertical for medical devices, recruited engineers for technical oversight, and revised qualification norms to reflect the industry’s complexity. These are not incremental steps—they signal a structural shift in how medical technologies are regulated in India.



### **Navigating the New Norm**

As stakeholders adjust to this new regulatory context, many questions being asked of the industry are unfamiliar but necessary. The shift demands a change in mindset. To support this transition, CDSCO is conducting regular stakeholder engagement programs—often in hybrid formats—to clarify expectations and foster mutual understanding. The regulatory approach, as demonstrated in cases like the flat panel detector, is based on logic and accountability: when a component is critical to patient safety, it must be licensed and traceable.

### **Aligning with Global Standards, with Strategic Caution**

India's entry as an affiliate member of the International Medical Device Regulators Forum (IMDRF) underscores its growing global engagement. While harmonization and collaboration with international norms are essential, a balance must be struck. Overreliance on foreign approvals can undermine India's strategic autonomy. The goal is to integrate globally without sidelining domestic capabilities—manufacture locally, validate internationally, and export competitively.

### **Making Quality Central, Especially for MSMEs**

Quality must be the cornerstone of India's MedTech vision. Lessons from the pharmaceutical sector, where early success was followed by quality challenges, must inform current efforts. Regulatory speed and scale must not come at the expense of standards. While large companies usually have systems in place, it is the micro, small, and medium enterprises (MSMEs) that require targeted education and support. Bringing them into the regulatory fold through inclusive mechanisms is essential for long-term success.

### **Exports as the Path to Sustainability**

While domestic demand will grow through rising insurance penetration and public health spending, the sustainability of India's MedTech sector depends on its ability to export. A strong export orientation—"Make in India, sell to the world"—is the only path to becoming a globally competitive manufacturing hub. Without exports, market growth risks stagnation despite rising local demand.

### **Regulatory Agility and Open Dialogue**

India's regulatory approach is evolving in real-time. Recognizing this, CDSCO has opened channels for informal resolution, addressing over 200 industry concerns—mostly from smaller firms—through consultative forums. This collaborative, problem-solving model not only enhances compliance but also improves regulatory design. Adaptability is being embedded into the governance model.





### **Embracing Digital Health Innovation**

Digital health represents an area of unique opportunity for India, merging its strengths in software and clinical expertise. Initiatives like the AIIMS–IIT MedTech program in Jodhpur are incubating promising startups that marry clinical insights with technological solutions. CDSCO is actively engaging with this space, having approved AI-based diagnostic tools and Software as a Medical Device (SaMD) solutions. But safety remains paramount—unlike tech products, failures in MedTech can be fatal. Regulatory responsiveness must be matched by rigor.

### **A Shared Vision for the Future**

India is well-positioned to become a global MedTech hub, but this journey requires shared responsibility, mutual respect, and constant dialogue. The regulator will walk alongside the industry—learning, enabling, and adapting. Together, stakeholders can build a self-reliant, resilient, and globally respected MedTech ecosystem that serves both India and the world.



## Panel Discussion

### MODERATOR:

Ms. Anisha Nair Dhawan

### EXPERTS:

- **Dr. Rajeev Singh Raghuvanshi**, Drugs Controller General of India, Central Drugs Standard Control Organization (CDSCO), Government of India (Chief Guest)
- **Shri C.K. Mishra**, Former Health Secretary and former Secretary Environment, Forest and Climate Change, Government of India
- **Mrs. Roli Khare**, Deputy CEO, Government e-Marketplace (GeM)
- **Dr. Rana Mehta**, Partner and Leader, Healthcare, PwC India
- **Mr. Hariharan Subramanian**, Managing Director, Siemens Healthcare Pvt. Ltd.
- **Mr. Manish Sardana**, Managing Director and General Manager South Asia, Vygon India Pvt. Ltd.





The MedTech session at the 11th annual NATHEALTH Arogya Bharat Summit 2025 featured key industry leaders and government officials discussing the critical role of medical technology in India's healthcare ecosystem. The Indian medical device market, currently valued at approximately \$15.35 billion (2023), has the potential to scale up to \$200 billion. The session explored the growing importance of MedTech, its effective application, strategies for industry growth in both domestic and export markets and policy recommendations for creating a sustainable MedTech ecosystem in India.



## The Critical Role of MedTech in Healthcare Delivery

MedTech has become a critical pillar in India's healthcare ecosystem for several interconnected reasons. It helps address significant gaps in healthcare delivery where human resource capacity and provisioning have been insufficient. AI and digital health technologies are essential for delivering healthcare services to the most remote individuals who need health services, ensuring last-mile delivery to those most in need.

Furthermore, MedTech provides better and more precise results in patient medical journeys, improving diagnostic accuracy and treatment efficacy. For MedTech to truly matter to the common person, it must be integrated at the point of care delivery rather than remaining theoretical. Ultimately, the MedTech industry survival depends on its relevance to the common person, making accessibility essential for both humanitarian and business reasons.

## Addressing Current Challenges

- **Affordability and Access**

The affordability of MedTech remains a critical challenge in India. There must be a balance between production costs and affordability for end users, as healthcare ultimately is about access, affordability, quality, and equity. While high production costs represent a valid concern for manufacturers, an industry producing products that nobody can afford will ultimately fail. Negotiation between industry and healthcare providers is necessary to reach cost structures that enable both sides to operate sustainably while ensuring patients can access needed technologies.





- **Geographic Distribution**

The real requirement for MedTech extends beyond metros to tier 2 and tier 3 cities. Recent years have seen doctors and technologies moving from metros to smaller cities, necessitating corresponding shifts in MedTech distribution. This migration of healthcare professionals and services represents a significant change in India's healthcare landscape. Product design, pricing, and production must align with actual needs rather than hypothetical demands, focusing on what is needed in these emerging healthcare markets rather than what manufacturers prefer to produce.

- **Human Touch**

The complete dissociation of patients from doctors creates challenges in the current social setting. Technology should bridge the gap between healthcare providers and patients rather than replacing human interaction. While technology is the biggest enabler of healthcare delivery in today's scenario, it should not be equated with healthcare delivery itself. The goal should be to use technology to enhance the capabilities of medical professionals rather than substituting for them.

## **Building the MedTech Industry's Future**


Several critical elements are necessary to promote the MedTech industry's growth in India. Appropriate government policies are essential for industry growth, extending beyond just fiscal incentives. Fiscal incentives alone are non-sustainable over the long term. Instead, the government must provide an ecosystem that allows the industry to establish, grow, and thrive through structured and predictable policy frameworks. Innovation stands as the key to industry success. India's software capabilities provide a unique advantage for MedTech innovation that should be leveraged to create distinctive value propositions in the global market.

Current regulatory frameworks require streamlining to support industry growth. A future-ready regulatory system should establish clear, transparent, time-bound norms for approvals and clearances, along with standardized performance criteria and benchmarks. Global harmonization of regulatory standards would further support industry development, positioning the regulator as a caretaker of the ecosystem rather than just an enforcer of rules. Predictability in policy, pricing, and procurement systems is essential for industry confidence. The MedTech sector needs stability to make long-term investments and strategic decisions that will drive growth and innovation.

## **White Paper Launch - MedTech 2.0**

The MedTech 2.0 NATHEALTH-PWC white paper highlighted several key aspects of the industry's future:

- The MedTech industry is projected to become a \$30 billion industry by 2030, representing significant growth from its current value.
- India currently has a low per capita use of MedTech compared to other countries, indicating substantial room for growth. Modern interventions are increasingly available to improve morbidity and mortality outcomes but come with cost implications that must be managed to ensure affordability for Indian citizens.

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- Demographic shifts present both challenges and opportunities for the sector. In the next 5 years, one out of five Indians will be above the age of 60, raising the fundamental question: Will India get rich before it gets old, or will it get old before it gets rich? This demographic transition demands that healthcare ecosystem promotion prioritize longevity and healthy aging as central concerns.
  - The government's role in healthcare has evolved significantly, shifting from being primarily a healthcare provider (opening hospitals) to becoming a payer. This transformation has profound implications for MedTech's role in the ecosystem, as procurement patterns and priorities change with this new governmental approach.

In future, regulatory policies and innovation ecosystems need development to support industry growth. Special focus should be placed on startups and fostering India's own "Silicon Valley" for MedTech to drive indigenous innovation. The industry needs to move beyond measuring healthcare solely in terms of services and products toward measuring outcomes—a shift that would better align incentives throughout the healthcare system.

## Industry Recommendations for MedTech Growth

The industry identified four key pillars to build the MedTech brand in India:

### 1. Stimulating Demand

While significant capacity building has occurred in the last decade, further demand is needed to support industrial growth. MedTech manufacturing requires large local demand to justify investments, particularly as the sector operates at smaller scales than other industries. The industry recommends expanding insurance coverage to include emergency care, ambulatory care, prevention, and early detection—areas currently underserved by existing insurance frameworks. Broadening the scope of the Government e-Marketplace (GeM) to include private and state agencies would further stimulate demand by creating more procurement channels.

### 2. Accelerating MedTech Software Adoption

Software represents approximately 50% of the value addition in medical devices, making it a critical focus area for the Indian MedTech sector. India's software capabilities are unparalleled in terms of human capital, providing a significant competitive advantage. Much of the software for global MedTech is already built and delivered from India, creating a foundation for further growth. The industry requests formal recognition of software as an essential part of MedTech, which would elevate its status in policy considerations. Data-rich environments in India can accelerate industry-academia collaboration if software and AI are recognized as essential MedTech components.

### 3. Addressing Affordability

The journey toward "Make in India" has begun for products ranging from basic medical devices and consumables to advanced imaging equipment. However, given the relatively small global production volumes for many medical devices, complete localization will take time to achieve scale and cost-effectiveness. The ultimate goal of localization is to make products affordable for Indian patients, which requires a long-term, strategic approach. In the interim, meaningful tariff rationalization is needed to support affordability. The industry proposes a 2-5 year period of tariff rationalization that would benefit both patients and the industry while localization efforts scale up.

### 4. Improving Compliance and Ease of Business

Product licensing has improved in terms of predictability, query resolution, and timelines, representing positive progress in the regulatory environment. However, obtaining Quality Control Orders (QCOs) and Bureau of Indian Standards (BIS) certifications still present challenges for the industry. While building Indian standards for newer products is understandable and appropriate, applying these requirements to the existing installed base of approximately 40,000 pieces of equipment creates significant compliance burdens. Laboratory capacity for certification needs substantial augmentation to handle this volume without creating bottlenecks. Prospective rather than retrospective requirements would help manage the transition to new standards without disrupting healthcare delivery.

### Government e-Marketplace (GeM) Support for MedTech

The Government e-Marketplace has become a significant enabler for the MedTech sector, creating a structured procurement platform that benefits both buyers and sellers. GeM currently hosts approximately 1,200 categories of medical devices, with each category having an average of 200-300 sellers. Top categories may have as many as 3,000-4,000 sellers, creating robust competition. Each category typically features 40-50 products or catalogs, providing sufficient variety for buyers. The transaction value in the MedTech sector through GeM has reached approximately ₹5,000 crores, demonstrating its growing importance. For buyers, GeM offers ready-made templates for tender documents that eliminate knowledge gaps and standardize procurement processes. These templates are developed through comprehensive research to ensure they capture all relevant specifications and requirements. Built-in compliance requirements for medical device rules and Indian Standards simplify the procurement process while ensuring regulatory compliance.

Direct access to a large database of sellers increases competition and options, while functionality for direct procurement, reverse auctions, order tracking, and capacity building improves efficiency. The trust-based system with undertakings from sellers reduces bureaucratic burdens, while the optional vendor assessment framework allows sellers to enhance their credibility through formal certification.

## Comprehensive Takeaways from Government Perspective on MedTech 2.0

### Regulatory Progress and Achievements

The Central Drugs Standard Control Organization has made significant strides in establishing a regulatory framework for medical devices in India. The agency has issued 3,900 manufacturing licenses for medical devices and approved 10,500 import licenses, demonstrating substantial regulatory activity since full implementation. Additionally, 900 import licenses and 280 manufacturing licenses have been issued specifically for in-vitro diagnostics, expanding the scope of regulated products. Most notably, approximately 1,000 manufacturing licenses fall within high-complexity Category C & D devices, which signals advancement in sophisticated technology areas & growing capabilities of domestic manufacturers.

### Addressing Industry Transition Challenges

Recognizing the difficulties facing a newly regulated industry, CDSCO has initiated comprehensive stakeholder awareness programs designed to bridge knowledge gaps between regulatory expectations & industry practices. The agency plans regular educational initiatives throughout the next year, following the successful model used with pharmaceuticals where 25 awareness programs were conducted for revised Schedule M. These programs focus specifically on helping manufacturers understand regulatory expectations & requirements, with particular attention to areas where confusion commonly arises, such as component traceability & quality systems.

### International Strategy

India has successfully secured affiliate membership in the International Medical Device Regulators Forum (IMDRF), positioning itself within the global regulatory community. The regulatory approach takes a nuanced position on international reliance—accepting approvals from other regulatory authorities while ensuring manufacturing occurs within India to build domestic capabilities.

### Quality as Foundation for Growth

Quality has been identified as the foremost priority for sustainable industry development, with the regulator drawing parallels to historical challenges in the pharmaceutical sector that must be avoided in medical devices. Special focus is placed on helping Micro, Small & Medium Enterprises understand & implement quality systems, as approximately 90% of regulatory issues originate from smaller companies due to lack of awareness rather than intentional non-compliance. The government advocates for more inclusive representation of MSMEs in industry discussions to ensure quality standards are universally understood & implemented.



## **Regulator-Industry Collaboration**

Continuous dialogue between industry and regulators is facilitated through innovative approaches, including bi-weekly open meetings that require no appointments. These sessions have seen more than 50% of participants representing the medical device industry, demonstrating the sector's need for regulatory clarity. Over 200 issues were addressed in an 8-9 month period, with approximately 70% resolved immediately, particularly those from smaller companies with straightforward concerns. These interactions provide valuable intelligence about on-the-ground challenges.

## **Digital Health Innovation**

Digital health has been identified as a critical frontier for healthcare delivery in India, with the potential to maximize the country's established software technology strengths. The regulatory framework is actively evolving to accommodate Software as Medical Devices (SAMDs) and AI-based medical technologies. Notable approvals already include photo-based diagnostic systems for diabetic retinopathy developed by Indian startups, demonstrating the regulatory pathway for innovative digital health solutions.

## **Future Outlook: Building the MedTech Brand in India**

The MedTech industry in India is on track to achieve significant growth, with a target of \$50 billion by 2030. India represents one of the fastest-growing markets for MedTech globally, creating substantial opportunities for both local and international companies. The country's unique combination of market size and talent pool, particularly in software, provides competitive advantages that few other markets can match.

Policy recommendations focus on enabling this growth through GST reforms to rationalize taxation, funding for accessibility in tier 1 and tier 2 towns to expand geographic reach, payment reforms to improve financial flows, and using medical devices to advance the digital health mission. These initiatives would create an integrated approach to healthcare expansion that supports MedTech adoption.

Government support for innovation and R&D has been positive and should continue to foster indigenous technological development. Importantly, harmonizing policies for both localized and imported products remains essential, as healthcare will never be 100% localized. Even in mature markets, medical technology includes a mix of locally produced and imported components and devices. Policy frameworks should recognize this reality while encouraging gradual increases in local content.



# Key Takeaways

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- **Enhance MedTech** accessibility by ensuring affordability and last-mile delivery in tier 2 and tier 3 cities.
- **Address** affordability challenges by balancing production costs with patient access and sustainable industry pricing models.
- **Foster** innovation by leveraging India's software expertise to create globally competitive MedTech solutions.
- **Implement** structured and predictable policy frameworks to support long-term industry growth.
- **Strengthen** regulatory frameworks with clear, transparent, and time-bound approval processes.
- **Encourage** the global harmonization of regulatory standards to enhance market access.
- **Improve** demand stimulation by expanding insurance coverage to include emergency and preventive care.
- **Develop MedTech**-focused R&D ecosystems to drive indigenous technological advancements.
- Facilitate industry-academia collaboration to advance AI and software-based medical technologies.
- **Revive** healthcare equity by ensuring MedTech adoption supports both urban and rural populations.
- **Support** startups in the MedTech sector by creating an ecosystem similar to a "Silicon Valley" for MedTech in India.
- **Promote** local manufacturing while maintaining a balanced approach to imports for essential medical devices.
- **Reduce** tariff barriers on critical medical technologies to improve affordability and industry competitiveness.
- **Expand** Government e-Marketplace (GeM) procurement to include private and state agencies for greater industry participation.
- **Ensure** human-centric healthcare by integrating MedTech to enhance rather than replace patient-provider interactions.
- **Optimize** policy predictability to enable long-term industry investment and strategic decision-making.
- **Streamline** quality control and compliance processes to prevent regulatory bottlenecks.
- **Advance** digital health innovations, including AI-driven diagnostics and Software as a Medical Device (SaMD).
- **Improve** government-industry collaboration through regular open meetings to address sector challenges.



# PLENARY SESSION



Accelerating Digital Health Adoption &  
Creating Pathways for Scalable  
Healthcare Innovations

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## Leaders Speak

### ‘NATHEALTH’s CSR programs are designed to align with industry needs, engage stakeholders, and create a lasting impact’



#### Mr. Sunil Thakur

Chief of Mission, NATHEALTH Foundation  
& GC member  
Partner, Quadria Capital

With a vast population and a growing disease burden, India faces significant challenges in healthcare access. Under these conditions, digital health has emerged as a necessity rather than an option. The transformation of healthcare systems through digital tools and innovations is essential to address issues of affordability, accessibility, and quality, especially in underserved Tier 2 and Tier 3 cities.

#### Strategic CSR Interventions in Healthcare

NATHEALTH, through its foundation, has initiated several strategic programs under its healthcare-focused CSR efforts. The aim is to create meaningful, high-impact platforms for stakeholders interested in supporting national goals of accessible and quality healthcare.

Three core areas guide this initiative: maximizing CSR impact for corporates in healthcare, contributing to key priority areas, and transforming the healthcare ecosystem through integration, innovation, and collaboration. The focus areas include building healthy communities, expanding access to affordable healthcare, and strengthening healthcare infrastructure.

#### Programmatic Framework

NATHEALTH’s CSR programs are designed in three formats to align with industry needs, engage stakeholders, and create a lasting impact.

- **Strategic Theme Programs:** Long-term initiatives addressing affordability, accessibility, and quality in healthcare.
- **Yearly Programs:** Dynamic programs tailored to specific annual priorities.
- **Short-Run Programs:** Time-bound initiatives with immediate impact on communities and environments.



### **Digitization of Healthcare Delivery**

A comprehensive digital health training program is underway to enable small and mid-sized healthcare providers to adopt digital tools and practices. The program targets providers in Tier 2 and 3 cities, aiming to reach 30,000 providers across 300 cities. Implementation is carried out through Digital Health Masterclasses, each engaging 40–50 providers per session, with support from high-quality partners such as QCI, MedLern, and Tech Mahindra. As of now, the program has trained 265 providers in five cities and is set to expand to seven more by March, with a target of scaling to 100 cities in FY 2025–26. The initiative is supported by funding, technology, and educational partners.

### **Supporting Scalable Health Innovation**

The second initiative focuses on accelerating health innovation by supporting startups with scalable, commercially viable solutions. A cohort of 25 startups has been initiated with plans to scale up to 1,000–1,500 startups. The approach includes structured boot camps in collaboration with academic institutions like IIT Delhi, mentorship from industry leaders, and curated educational content designed to ensure commercial traction. Jury panels of private equity professionals and healthcare experts provide critical feedback to improve the viability and scalability of these ventures.

### **Institutionalizing Patient Safety**

The third program aims to institutionalize patient safety practices nationwide. For the past two years, efforts have focused on increasing awareness through policy engagement, training, technology integration, and public campaigns. The objective is to reduce adverse events, enhance recovery outcomes, and foster a culture of continuous improvement. Over 300,000 individuals have been reached through awareness campaigns. A white paper has been developed outlining patient safety challenges and proposing evidence-based solutions. Patient safety awards have also been instituted to recognize best practices. Plans are in place to launch a nationwide digitized campaign and structured training modules for professionals.

### **Path Forward and Collaborative Ecosystem**

Future efforts will be anchored in partnerships with financial, technological, and implementation stakeholders. As an apex healthcare industry federation with a wide network and a strong implementation track record, NATHEALTH provides end-to-end execution, co-branding opportunities, media engagement, and certification for collaborators. The goal is to build a resilient, inclusive, and digitally empowered healthcare ecosystem through collaborative action.



## Panel Discussion

### EXPERTS:

- **Dr. Atul Mohan Kochhar**, CEO, The National Accreditation Board for Hospitals & Healthcare Providers (NABH)
- **Dr. Raajiv Singhal**, CEO & MD, Marengo Asia Healthcare
- **Mr. Neeraj Jain**, Director, Board-NATHEALTH Foundation, Country Director – India and Director Growth Operations – Asia, Middle East & Europe, PATH

### MODERATOR:

**Mr. Amit Mookim**  
CEO, Immuneel  
Therapeutics





## The Role of NATHEALTH in Digital Health & Policy Implementation



**Dr. Atul Mohan Kochhar**  
CEO, The National Accreditation Board for Hospitals & Healthcare Providers (NABH)



**Dr. Raajiv Singh**  
(CEO & MD, Marengo Asia Healthcare)

As India navigates the complexities of healthcare access, the imperative to embrace digital health is stronger than ever. The 11th NATHEALTH Arogya Bharat Summit highlights the necessity of digital transformation, recognizing it not as an option but as a necessity to address challenges posed by a vast population, rising disease burden, and healthcare accessibility gaps.

### NATHEALTH's Collaborative CSR and Partnership Initiatives

NATHEALTH is driving transformation through three key programs:

- **Digital Health Masterclass:** A structured initiative aimed at digitizing healthcare systems across Tier 2 and Tier 3 cities.
- **Health Nexus Accelerator:** Focused on fostering startups that drive healthcare innovation at scale.
- **Patient Safety Initiative:** Institutionalizing best practices in patient safety through awareness, policy advocacy, and industry collaboration.

Together, these initiatives drive a more efficient, technology-enabled, and patient-centric healthcare system, ensuring accessibility, innovation, and safety remain at the forefront of India's healthcare evolution.

### Advancing CSR in Healthcare: A Strategic Approach

At NATHEALTH, CSR initiatives are designed to create impactful, sustainable healthcare solutions. The CSR strategy focuses on creating sustainable healthcare solutions through three key areas:

1. **Maximizing CSR Impact:** Assisting corporates in optimizing their healthcare-related CSR investments.
2. **Addressing Key Thrust Areas:** Identifying and contributing to critical gaps in healthcare.
3. **Transforming the Healthcare Ecosystem:** Driving integration, innovation, and collaboration to ensure sustainable growth.





### Three Focus Areas:

1. **Building Healthy Communities** – Promoting wellness and preventive care.
2. **Providing Access to Affordable and Quality Healthcare** – Expanding medical services.
3. **Strengthening Healthcare Infrastructure** – Enhancing facilities and workforce development.

## Driving Digital Health Transformation

The Digital Health Masterclass aims to empower smaller healthcare providers across the country by providing them with the knowledge and skills required to adopt digital health solutions effectively.

This initiative has set ambitious goals, starting with the training of 5,000 providers in 50 cities, and further expanding to 30,000 providers in 300 cities. This expansive outreach is vital to fostering the nationwide digitization of healthcare, particularly for smaller practices that often face challenges in adopting technology due to limited resources.



**Mr. Neeraj Jain**  
Director, Board- NATHEALTH Foundation, Country  
Director – India and Director Growth Operations – Asia,  
Middle East & Europe, PATH



**Mr. Amit Mookim**  
CEO, Immuneel Therapeutics

## Key Elements of the Approach

- **Masterclasses for Smaller Healthcare Providers:** In collaboration with esteemed organizations such as the Quality Council of India (QCI), MedLearn, and Tech Mahindra, these masterclasses focus on educating smaller healthcare providers on the benefits and implementation of digital health technologies.
- **Rapid Success in Initial Training:** The program has already seen remarkable success, with 265 providers trained in just one month.
- **Planned Expansion:** To reach 100 cities by the fiscal year 2025-26, the program is poised for significant growth. The expansion will be supported by increasing investments and strategic partnerships in funding, technology, and education. This comprehensive approach not only builds technical capacity but also ensures that smaller healthcare providers can maintain sustainable growth through the adoption of digital health solutions.
- **Accelerating Healthcare Innovation:** NATHEALTH is playing a pivotal role in driving healthcare innovation by supporting late-stage startups through a well-structured ecosystem. This initiative is designed to foster the growth of emerging healthcare technologies, streamline their commercialization, and ensure their scalability.



- **Cohort-Based Model:** NATHEALTH is currently supporting a cohort of 25 startups, with plans for an ambitious expansion to 1,000-1,500 startups. This model provides these startups with access to critical resources, industry expertise, and strategic guidance that can help them refine their products and services.
- **Mentorship and Bootcamps:** To ensure the success of these startups, NATHEALTH offers industry mentorship and organizes structured bootcamps. These boot camps, in collaboration with leading institutions like IIT Delhi, provide hands-on experience and in-depth guidance on various aspects of healthcare innovation, from product development to commercialization.
- **Development of Educational Materials:** NATHEALTH works closely with private equity investors and healthcare leaders to develop educational resources tailored for startups.
- **Awareness Campaigns:** One of the key strategies for promoting patient safety is raising awareness. NATHEALTH has launched campaigns that have reached over 300,000 individuals, educating the public, healthcare providers, and institutions on best practices and the importance of patient safety.
- **White Papers and Evidence-Based Interventions:** NATHEALTH has published white papers that identify the key challenges in patient safety and propose evidence-based solutions.
- **Institutionalized Patient Safety Awards:** To further encourage the adoption of patient safety best practices, NATHEALTH has introduced the Patient Safety Awards. These awards recognize institutions and healthcare professionals who have demonstrated excellence in patient safety, creating role models for others to follow.

## Future Initiatives

Looking ahead, NATHEALTH is focused on expanding its initiatives to ensure long-term improvements in healthcare quality and safety. These initiatives will reach a broader audience and address critical gaps in the healthcare ecosystem:

- **Nationwide Structured Training Programs:** To build capacity in healthcare professionals, NATHEALTH is planning to roll out nationwide structured training programs.
- **Digital Awareness Campaigns:** In addition to training healthcare professionals, NATHEALTH plans to launch digital awareness campaigns targeting patients, caregivers, and healthcare workers. These campaigns will educate the public about the importance of patient safety, digital health tools, and their role in improving healthcare outcomes.

## The National Digital Health Mission (NDHM) and Its Strategic Impact

The ABDM, launched 4.5 years ago by the Government of India, provides a robust digital infrastructure aimed at transforming the healthcare ecosystem, offering a comprehensive digital roadmap to enhance accessibility, quality, and efficiency across the country's healthcare system.



## Building Blocks of the NDHM

- **ABHA (Ayushman Bharat Health Account) Numbers:** Unique health IDs for secure patient identity and seamless healthcare access.
- **Healthcare Professional Registry (HPR):** Standardizes credentials, ensuring verified, transparent, and accountable healthcare providers.
- **Interoperability:** Establishes uniform protocols for smooth health data exchange across platforms.
- **Digital Health Standards:** Sets guidelines for HIS and EMR systems to ensure secure, efficient, and user-friendly digital healthcare.

Despite progress, digital adoption in healthcare is slow. Only 108 hospitals are digitally accredited, and 58 vendors have applied for NABH standards. Yet, just 10% of healthcare organizations follow the NDHM framework, leaving 90% behind. This gap challenges India's goal of becoming a 'Viksit Bharat' by 2047. Closing it is key to transforming healthcare.

## NATHEALTH's Role in Driving Digital Adoption

NATHEALTH, as a federation, plays a crucial role in bridging the digital divide through:

- **Low-cost, user-friendly digital health programs:** These initiatives aim to make digital health frameworks accessible and scalable.
- **Capacity building and education:** Offering foundational and master courses at minimal or no cost.
- **Providing a stimulus for digital transformation:** Encouraging hospitals to leverage digital tools to enhance patient safety and healthcare quality.

A structured push toward digital adoption will ensure greater compliance, improved healthcare outcomes, and an efficient ecosystem where patient safety is enhanced through digital integration.

There is a growing necessity to foster an innovation-driven ecosystem in healthcare. This involves connecting healthcare innovators with the right resources, funding, and mentorship to turn their ideas into impactful solutions.

## Core Focus Areas for Innovation-Driven Healthcare Ecosystem

**Bridging Ideas to Execution:** Healthcare startups need funding, mentorship, and resources to turn ideas into market-ready solutions.

**Real-World Testing:** Marengo Asia Hospitals partners with startups, providing clinician mentorship and clinical testing to ensure innovations meet practical needs.

**Scalable Framework:** A structured approach helps startups integrate into healthcare, ensuring sustainable growth while maintaining industry standards and patient care quality.



## Addressing Fragmentation and Enhancing Collaboration

A well-structured network that fosters ecosystem-wide collaboration can help address this fragmentation by balancing the growth of the private sector and ensuring that healthcare services are accessible to all. The following takeaways are most pertinent:

- Scaling up healthcare innovations to maximize impact while maintaining accessibility.
- Enhancing private-public sector collaboration to ensure the ABDM framework is universally adopted.
- Leveraging technology as the primary enabler in breaking silos and fostering seamless healthcare partnerships.

## The Role of NATHEALTH as an Integrative Platform

NATHEALTH drives digital adoption by uniting hospitals, startups, innovators, and policymakers to foster collaboration and advance a unified healthcare vision.

### Key Areas of Focus

- **Hospitals and Healthcare Providers:**
  - Promoting NABH-accredited digital health standards for quality care.
  - Enhancing patient care and decision-making through digital solutions.
  - Ensuring accountability, transparency, and efficiency in healthcare services.
- **Startups and Innovators:**
  - Facilitating partnerships for funding, mentorship, and market access.
  - Supporting product refinement and clinical validation.
  - Addressing regulatory challenges to accelerate healthcare innovation.
- **Regulatory Bodies and Policymakers:**
  - Aligning digital health standards with national healthcare objectives.
  - Creating a supportive framework for equitable digital health solutions.
  - Advancing inclusivity in healthcare through innovation.

## Strategic Imperatives for Future Growth

To unlock the full potential of NATHEALTH and its broader ecosystem, a comprehensive multi-pronged strategy must be implemented.

- **Policy Advocacy and Standardization**
  - Promoting Ayushman Bharat Digital Mission (ABDM) compliance.
  - Encouraging NABH accreditation for digital health adoption
  - Advocating regulatory frameworks balancing innovation and patient safety.
- **Capacity Building and Skill Development**
  - Expanding training programs for healthcare professionals.
  - Establishing mentorship programs for startups.
  - Bridging skill gaps to drive digital transformation
- **Scaling Entrepreneurial Success**
  - Providing funding and incubation support for startups.
  - Ensuring regulatory compliance and scalability.



- **Enhancing Stakeholder Engagement**

- Strengthening public-private partnerships for digital healthcare.
- Uniting hospitals, policymakers, and innovators for collective progress.

## **The Road Ahead**

Strengthening Healthcare Through Partnerships NATHEALTH's multi-stakeholder approach fosters innovation, accessibility, and quality. By integrating digital healthcare, entrepreneurship, and industry collaboration, India is poised to lead global digital health advancements, shaping a resilient, future-ready ecosystem.

Digital healthcare is not just an enabler but a necessity for ensuring quality, accessibility, and equity in the future of healthcare. The commitment of stakeholders across the spectrum—hospitals, startups, regulatory bodies, and industry leaders—will define the trajectory of healthcare transformation in India and beyond.

# Key Takeaways

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- **Enhance** digital health adoption to transform India's healthcare landscape.
- **Scale** the Digital Health Masterclass to train 30,000 providers across 300 cities.
- **Expand** the Health Nexus Accelerator from 25 to 1,000+ startups to drive innovation.
- **Strengthen** patient safety awareness, reaching over 300,000 individuals.
- **Advance** structured CSR initiatives to improve healthcare access and infrastructure.
- **Address** healthcare fragmentation through stronger collaboration and digital integration.
- **Bridge** regulatory gaps, as only 10% of healthcare organizations comply with NDHM standards.
- **Ensure** NABH accreditation for digital health solutions to uphold patient safety and care quality.
- **Leverage** public-private partnerships to create scalable and equitable healthcare solutions.
- **Align** policy, capacity building, and technology adoption to shape a future-ready healthcare system.





# PLENARY SESSION



Role of (National Health Claim Exchange (NHCX) in Digital Health Convergence

KNOWLEDGE  
PARTNER

**Deloitte.**



## Leaders Speak

### 'Healthcare insurance: The engine driving healthcare access and growth'



#### Dr. Sangita Reddy

Vice President, NATHEALTH,  
Joint Managing Director,  
Apollo Hospitals Enterprise Ltd.

Insurance serves as the engine that drives the healthcare industry by enabling payment systems and allowing individuals to afford healthcare. This vital connection became evident through pioneering efforts in rural India, where innovative models like the "health passport" demonstrated how sustainable insurance systems could replace traditional charity models. In Aragunda village, a one-rupee-per-day insurance scheme created India's first fully insured population for a rural hospital, proving that community-based insurance models could succeed.

#### Evolution of Health Insurance Programs in India

The success of early models led to the development of larger insurance programs. Starting with the Andhra Aarogya Bhadrata for the police force covering 500,000 people, these initiatives expanded to Karnataka farmers through the Yeshaswini program and later evolved into Aarogya Shri and Rajiv Aarogya Shri. Under the Ayushman Bharat and Pradhan Mantri schemes, coverage has expanded dramatically, now reaching approximately 52% of India's population—a significant achievement for the nation's healthcare system.

#### Addressing Real-World Patient Challenges

A critical concern remains the uncertainty patients face during the claims process. Patients often don't know when they'll receive authorization or when they can discharge family members without facing additional financial burdens. This uncertainty creates stress and financial hardship that must be addressed urgently through improved claims processing systems.

#### The Digital Divide in Healthcare Providers

While high-end hospitals have advanced digital infrastructure like ambient listening and paperless systems, approximately 70% of India's healthcare happens in smaller 50-bed nursing homes and clinics that lack digital capabilities.



The challenge lies in creating value propositions that incentivize these smaller facilities to invest in digitalization. Solutions must be as simple and accessible as popular consumer applications like WhatsApp, Swiggy, or mobile banking to encourage widespread adoption.

### **The National Health Claims Exchange (NHCX)**

The NHCX represents a critical milestone in healthcare digitalization as one of the three digital gateways being developed by the Ayushman Bharat Digital Health Mission. This platform aims to revolutionize health insurance claims processing through automation, reducing costs and processing times, minimizing inefficiencies, and lowering per-claim costs.

### **Cost Efficiency as a Priority**

The cost per claim varies dramatically worldwide—from \$600 per claim in America to \$27 in Singapore. India must strive to reduce this cost to the lowest possible level to keep insurance premiums affordable. Rising premiums are often blamed on healthcare providers, without acknowledging the impact of inflation, increasing costs, and growing compliance requirements. Productivity improvements across the healthcare ecosystem represent one of the most powerful levers for addressing this challenge.

### **A Sustainable Insurance Model**

Insurers should focus more on generating returns from the float of collected premiums rather than increasing margins on the premiums themselves. This approach would help keep operating costs and premiums low, making insurance accessible to India's "missing middle"—those who don't qualify for government schemes but struggle to afford private insurance. The ultimate vision remains a fully insured population with unified automation serving as a powerful lever toward achieving this goal.

### **The Future of Data-Driven Healthcare**

While digitalization promises tremendous future benefits through AI models for predictive and preventive healthcare, addressing the current state of digitalization across the healthcare sector must come first. When the healthcare ecosystem approaches these challenges collectively, it can build more powerful solutions that benefit the entire country, ensuring that healthcare spending is directed toward actual care provision rather than administrative overhead.



## Leaders Speak

### ‘NHCX is driving seamless, secure, and scalable digital health claims in India’



#### Mr. Vikram Pagaria

Director IT, National Health Authority

The National Health Claims Exchange (NHCX) stands as a crucial pillar in the Ayushman Bharat Digital Mission (ABDM), representing the fourth and most digitization-focused initiative under the Ayushman Bharat umbrella. It is designed to streamline the flow of health insurance claims data between providers and payers, removing inefficiencies, redundancies, and delays that currently plague the process.

#### Streamlining Health Claims Through Standardization and Automation

At its core, NHCX acts as a single digital gateway between hospitals and insurers, replacing the fragmented system where hospitals must manage separate portals and workflows for each insurer. Through NHCX, hospitals can now transmit claims directly from their Hospital Management Information Systems (HMIS) to any insurer, regardless of which policy the patient holds. This standardization not only simplifies processes for providers but also accelerates the claim lifecycle, significantly reducing administrative costs. The shift from manual and paper-heavy processing to automated digital workflows paves the way for scalable products such as outpatient (OPD) insurance, which has previously been hindered by high claim processing costs.

#### Enhancing User Experience and Transparency

NHCX improves the insurance experience for patients by providing real-time visibility into their claims—patients can track their claim status, determine eligibility for treatments, and verify whether their insurance schemes are valid or applicable. The reduction in uncertainty and wait times during hospital visits marks a major step toward citizen-centric healthcare. Removing the opacity in the system builds trust and fosters a smoother engagement between caregivers and families during medical events.



### **Data Privacy and Governance at the Forefront**

Privacy and data protection are fundamental design principles of the ABDM and NHCX. The architecture follows a federated model where health records are not centrally stored. Instead, data is pulled only with patient consent and pushed directly from the source to the doctor or payer as needed. Claims data is encrypted end-to-end, and the NHA remains completely blind to the contents of the claim. All entities integrating with NHCX must undergo annual security audits conducted by certified agencies, ensuring compliance and safeguarding data integrity.

### **Incentivizing Adoption and Addressing Change Management**

Recognizing the inertia that accompanies large-scale digital transformation, NHCX introduces financial incentives through the Digital Health Incentive Scheme. Hospitals are rewarded with Rs. 500 or 10% of the claim (whichever is lower) for each claim processed through NHCX. Additionally, digital record creation is incentivized, with Rs. 20 allocated to the hospital and Rs. 5 to the software provider for each ABDM-linked health record.

To further support smaller providers and under-digitized segments, NHCX is working on accessible HMIS systems in collaboration with CDAC. These systems will be offered at a minimal cost of Rs. 299 per month, enabling even solo practitioners and small nursing homes to enter the digital ecosystem.

### **Looking Ahead: Auto-Adjudication and AI Integration**

As part of future expansion, NHCX is exploring the integration of auto-adjudication for low-value, high-volume claims such as dialysis, using digitized lab reports or OCR-extracted values. This step promises to lower the cost of insurance operations, making it feasible to extend coverage to OPD and preventive care. In parallel, AI-driven features like automated prescription generation during doctor-patient interactions are being piloted across AIIMS and other public health facilities, with plans to roll them out to the private sector.



## Panel Discussion

### MODERATOR:

**Mr. Ashish Rampuria**, Partner – Strategy, Risk & Transactions, Deloitte India

### SESSION CHAIRMAN :

**Dr. Sangita Reddy**, Vice President, NATHEALTH and Joint Managing Director, Apollo Hospitals Enterprise Ltd.

### EXPERTS:

- **Mr. Vikram Pagaria**, Director IT, National Health Authority
- **Dr. Vikram Jit Singh Chhatwal**, Chairman & Whole Time Director, Medi Assist Group
- **Dr. Ajay R. Nair**, CEO, SWASTH





The National Health Claims Exchange (NHCX) is transforming healthcare financing by streamlining claims processing through automation and AI. This digital initiative under Ayushman Bharat enhances efficiency, reduces costs, and accelerates payments, ensuring financial sustainability for providers and accessibility for patients.

Healthcare insurance remains a key enabler, with models like Aarogya Shri and Ayushman Bharat covering 52% of the population. However, bridging the "missing middle" requires strategic collaboration, affordable premiums, and co-pay structures.

- **Insurance as a Strategic Catalyst** – Drives affordability, strengthens financial sustainability, and ensures industry resilience.
- **The Aragunda Model** – A pioneering community-driven insurance framework showcasing sustainable rural healthcare solutions.
- **Expansion & Industry Collaboration** – Initiatives like Aarogya Shri and Ayushman Bharat have scaled coverage, yet strategic efforts are needed to bridge remaining gaps.
- **Digital Transformation & NHCX** – Automation, AI, and standardized billing are revolutionizing claims processing, optimizing stakeholder efficiency, and reducing costs.
- **Future Goals** – Achieving universal coverage demands innovative models, streamlined operations, and continued investment in digital infrastructure.



## Driving Healthcare Claims Digitization with NHCX

The National Health Claims Exchange (NHCX) is revolutionizing India's health insurance system by automating claims processing and ensuring seamless communication between insurers and providers. As a key pillar of the Ayushman Bharat Digital Mission, NHCX enhances efficiency, reduces costs, and improves user experience. However, industry-wide collaboration is essential to scale adoption and maximize its impact.





## Key Points

- **NHCX as a Game-Changer** – Automates claims processing, reducing inefficiencies and costs.
- **Part of Ayushman Bharat Digital Mission** – Strengthens India’s digital health ecosystem.
- **Interoperability & Standardization** – Enables seamless exchange of claims data.
- **Improved User Experience** – Faster approvals and real-time claim tracking.
- **Industry-Wide Collaboration** – Hospitals, insurers, and tech providers must work together.
- **Challenges in Adoption** – Awareness and participation need to scale up.
- **Future Vision** – A fully digital, efficient, and inclusive health insurance system.

## Addressing Provider Challenges Through NHCX

The transition to NHCX presents a significant opportunity for healthcare providers, but adoption remains slow due to key concerns. Many providers, especially smaller nursing homes, are hesitant due to a lack of awareness, uncertainty about benefits, and the perceived cost of digital transformation.

Larger hospitals, meanwhile, seek greater clarity on data security and system integration. Addressing these challenges through strategic communication and industry collaboration will be crucial in accelerating adoption.

### Key focus areas for successful implementation

- **Awareness & Advocacy** – More champions are needed to drive awareness and engagement.
- **Clear Value Proposition** – Faster claim approvals and quicker reimbursements must be emphasized.
- **Cost Concerns** – Small providers fear high digital transition costs; affordable solutions are needed.
- **Data Security Assurance** – Transparent communication on encryption and privacy is essential.
- **Simplified Processes** – Removal of Aadhaar registration has already reduced friction.
- **User Interface (UI/UX) Improvement** – Providers need real-time claim tracking for better visibility.
- **Industry Collaboration** – Workshops and stakeholder engagement can drive faster adoption.

The shift to a digital, interoperable claims process is inevitable. Proactive participation will ensure that providers stay ahead in the evolving healthcare ecosystem.



## NHCX: A Game-Changer for India's Health Insurance Landscape

The **National Health Claims Exchange (NHCX)** is a transformative step toward a fully digitized, seamless healthcare ecosystem. By enabling structured data exchange between insurers and providers, it has the potential to bridge critical gaps in insurance coverage, particularly for the missing middle—those who neither qualify for government schemes nor can afford private insurance. Collaboration between the government, private sector, and tech innovators will be key to maximizing its impact.

### Key Opportunities with NHCX

- **Expanding Insurance Coverage** – Enabling access for the uninsured and underinsured segments.
- **Seamless Digital Integration** – Eliminating silos in healthcare data exchange.
- **Cost Efficiency & Transparency** – Reducing administrative burdens and processing costs.
- **Scalability & Future-Readiness** – Adapting to evolving healthcare needs and policies.
- **Supporting Preventive & OPD Care** – Expanding coverage beyond hospitalization.
- **Encouraging Innovation** – Creating opportunities for new insurance models.
- **Rapid Evolution & Policy Support** – Ensuring continuous improvement through stakeholder feedback.

Through strategic collaboration and industry-wide engagement, NHCX has the potential to drive greater accessibility, affordability, and efficiency in the sector.

### Evolving TPA Business Model in the NHCX Era

With **NHCX integration**, Third-Party Administrators (TPAs) are transitioning from **administrative cost centers to strategic, data-driven partners** in the healthcare ecosystem.

By leveraging **machine-readable data**, TPAs can improve **risk mitigation, fraud prevention, and real-time decision-making**, benefiting both **insurers and providers**.

### Key Transformations for TPAs

- **Data-Driven Decision Making** – Moving beyond administration to analytics-driven insights.
- **Operational Efficiency** – Faster, automated claims processing and billing.
- **Risk Mitigation** – Enhancing fraud prevention and reducing systemic risks.
- **Transparency & Trust** – Standardized, interoperable data flow across stakeholders.
- **New Product Innovation** – Enabling tailored insurance models, including OPD coverage.
- **Improved Cash Flow** – Accelerating payments and receivables for hospitals.
- **Enhanced Policyholder Experience** – Faster approvals, seamless interactions, and better service.

As **TPAs embrace digital transformation**, their role will evolve into a **strategic enabler of efficiency, collaboration, and innovation** in India's healthcare financing landscape.

## Driving Digital Transformation in Healthcare

NATHEALTH is driving digital transformation in India's healthcare, enhancing efficiency, accessibility, and affordability. While AI and analytics offer long-term gains, the immediate focus is on streamlining claims and patient discharge to ease financial stress.

The key challenge is digital adoption for small and mid-sized hospitals, which form India's healthcare backbone. Lowering operational costs is crucial to keeping insurance premiums affordable, expanding coverage for the missing middle.

### Key Focus Areas

- **Faster Claims & Discharge** – Ensuring quicker approvals to ease financial burden on patients.
- **Hospital Digital Adoption** – Enabling smaller hospitals to embrace digitization.
- **Data-Driven Insights** – Utilizing AI and analytics for better healthcare decision-making.
- **Cost Efficiency** – Lowering administrative costs to keep insurance premiums affordable.
- **Productivity & Compliance** – Streamlining operations to improve healthcare affordability.
- **Industry Collaboration** – NATHEALTH must lead partnerships for scalable digital solutions.
- **Financial Sustainability** – Encouraging insurers to optimize fund utilization instead of relying on premium margins.

## Building a Collaborative Digital Healthcare Ecosystem

A structured approach is essential to drive digital transformation in healthcare, ensuring awareness, seamless collaboration, and clear value for all stakeholders, including patients, providers, insurance companies, and TPAs.

The focus is on making digital adoption feasible for both large and small healthcare providers.

### Key strategies include:

- **Enhancing Data Security & Governance** – Implementing privacy-by-design frameworks to secure patient data with controlled access across the ecosystem.
- **Supporting Small & Mid-Sized Providers** – Offering cost-effective digital solutions like HMIS to help smaller hospitals and clinics transition smoothly.
- **Streamlining Insurance Processing** – Leveraging AI-driven auto-adjudication to reduce claim processing costs and ensure faster approvals.
- **Promoting Digital Incentives** – Encouraging adoption through financial incentives for digital claims processing and record generation.
- **Integrating AI for Prescription Automation** – Deploying AI tools to assist doctors in auto-generating prescriptions, reducing administrative workload.
- **Expanding Digital Health Infrastructure** – Collaborating with public and private entities to ensure standardized digital health records and accessibility.
- **Encouraging Industry- Wide Collaboration** – Engaging policymakers, technology providers, and healthcare stakeholders to drive a unified digital healthcare strategy.

These initiatives aim to accelerate digital adoption while ensuring efficiency, security, and inclusivity in India's healthcare ecosystem.



## Driving Innovation in Health Insurance Through Collaboration

NATHEALTH plays a crucial role in accelerating innovation by leveraging digitization and reducing claim processing costs, paving the way for new insurance products and enhanced stakeholder collaboration. A structured approach can drive this transformation through:

- **Expanding Parametric Health Insurance** – Enabling fixed payouts based on predefined medical conditions using transparent data exchange.
- **Developing Usage-Based Insurance** – Adjusting premiums dynamically based on real-time health and lifestyle data.
- **Enhancing On-Demand Coverage** – Offering short-term policies tailored for specific medical events or emergencies.
- **Advancing Predictive Insurance Models** – Utilizing analytics to assess risk profiles and design proactive coverage solutions.
- **Strengthening Actuarial Data** – Building a robust data ecosystem to improve risk assessment and pricing accuracy.
- **Integrating AI in Claims Processing** – Automating adjudication to ensure efficiency, reduce fraud, and enhance customer experience.
- **Fostering Industry-Wide Collaboration** – Encouraging partnerships between insurers, healthcare providers, and regulatory bodies for seamless implementation.

With these strategic initiatives, NATHEALTH can drive digital transformation in insurance, ensuring affordability, accessibility, and efficiency across the ecosystem.

## Industry Stakeholder Collaboration Strategy for OPD Coverage

NATHEALTH plays a key role in advancing outpatient (OPD) coverage by leveraging digitization and real-time data from NFCX. A structured approach can enhance industry collaboration and drive OPD insurance adoption through:

- **Expanding On-Demand OPD Coverage** – Enabling flexible outpatient benefits that policyholders can customize based on their evolving healthcare needs.
- **Integrating OPD with Group Insurance** – Extending corporate flexi-benefits to allow employees to allocate funds for consultations, diagnostics, or wellness programs.
- **Enhancing Data-Driven Customization** – Utilizing NFCX's real-time data to offer personalized OPD coverage tailored to individual health patterns.
- **Streamlining Claims Processing** – Leveraging digital platforms to simplify reimbursement and cashless transactions for outpatient expenses.
- **Encouraging Preventive Healthcare** – Structuring OPD plans that incentivize preventive screenings, wellness programs, and early interventions.
- **Facilitating Seamless Provider Collaboration** – Strengthening partnerships between insurers, TPAs, and healthcare providers to ensure cost-effective and efficient OPD services.
- **Creating Scalable and Affordable OPD Plans** – Designing cost-effective models that balance insurer viability with customer affordability, driving wider adoption.





## Accelerating Healthcare Claims Digitization

To fast-track the digitization of healthcare claims, collaborative efforts among industry stakeholders are essential. Key steps include:

- **Establishing a Continuous Feedback Loop** – Engaging actively with the NHA to refine and enhance digital claim processing based on real-world insights.
- **Driving Cross-Sector Pilots** – Bringing together payers, providers, and technology partners to test and showcase the effectiveness of NFCX in live environments.
- **Developing Incentive-Based Models** – Exploring insurer-led initiatives that reward healthy behaviors, such as gym memberships or preventive care, through digital integration.
- **Strengthening Public-Private Partnerships** – Collaborating with regulatory bodies, financial institutions like NPCI, and digital health platforms to create a seamless claims ecosystem.
- **Co-Developing Scalable Solutions** – Shifting from a top-down approach to a co-creation model where all stakeholders contribute to shaping and refining digital health infrastructure.

By fostering **deep engagement and innovation**, the industry can unlock the full potential of **digitized healthcare claims**, ensuring efficiency, transparency, and value-driven outcomes.

## Global Learnings for a Unified Health Exchange

NATHEALTH can leverage global insights to strengthen India's healthcare digitization efforts.

### Key Global Insights for India's Digital Health Expansion

- **Stable Policies:** India's consistent policies support seamless digital health growth.
- **Economic Strength:** Well-managed financial resources drive universal health coverage.
- **Robust Infrastructure:** Advancements in public and private sectors boost readiness.
- **Public Trust:** Strong PMJAY adoption contrasts global skepticism.
- **Equitable Access:** Addressing rural-urban gaps ensures balanced healthcare.
- **Private Sector Integration:** Learning from South Africa, India is engaging private providers.
- **Flexible Digital Systems:** Open standards (like UPI, Aadhaar) enable innovation and inclusivity.

Collaboration between policymakers, insurers, and providers is crucial to harness these learnings for a seamless digital healthcare future.

## Strengthening Healthcare Through Industry Collaboration

A thriving healthcare ecosystem depends on seamless collaboration between industry stakeholders. From policymakers and insurers to hospitals and technology providers, collective efforts drive innovation, efficiency, and accessibility.





## Key Action Points

- **Demonstrate Value:** Show clear benefits to drive stakeholder adoption.
- **Stakeholder Engagement:** Conduct more workshops with hospitals, insurers, and TPAs.
- **Community Involvement:** Encourage active participation from all industry players.
- **Clear Communication:** Simplify technical concepts to build trust and awareness.
- **Collaborate with Industry Bodies:** Work closely with NATHEALTH and others to refine policies and regulations.

## Driving Industry Collaboration for NHCX Success

The healthcare industry is at a pivotal moment with the digitization of claims through NHCX. Achieving its full potential requires strong collaboration between policymakers, healthcare providers, insurers, and industry bodies.

By addressing challenges such as awareness, stakeholder engagement, and trust, the ecosystem can unlock efficiencies, enhance patient experiences, and drive innovation.

- **Streamlining Processes:** Faster claim processing, reduced fraud, and improved data accessibility.
- **India's Advantage:** Unlike global challenges, India's stable policies and infrastructure support seamless adoption.
- **Bridging Awareness Gaps:** Clear communication of benefits to stakeholders is essential for adoption.
- **Collaborative Approach:** Hospitals, insurers, and regulators must work together to refine and strengthen the system.
- **Long-Term Commitment:** Regular consultations and engagement will ensure sustainable implementation and success.



# Key Takeaways

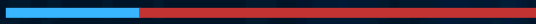
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- **Transform** claims processing through NHCX by automating approvals, minimizing inefficiencies, and enabling transparency via interoperability.
- **Expand** insurance coverage to support those ineligible for government schemes and unable to afford private insurance.
- **Address** adoption barriers for smaller hospitals by reducing costs, improving integration, and enhancing digital readiness.
- **Elevate** TPAs into data-driven partners by using AI for fraud detection and faster, more accurate reimbursements.
- **Streamline** digital claims processing to reduce financial stress and promote timely, efficient healthcare payments.
- **Strengthen** OPD and preventive healthcare by deploying digital incentives and leveraging real-time claims data.
- **Foster** interoperability and secure data exchange through collaborative efforts between public and private stakeholders.
- **Adopt** global best practices to build stable, equitable, and sustainable healthcare access through strong policies and partnerships.
- **Align** policies and regulations to accelerate digital adoption and create a fair, efficient health insurance ecosystem.
- **Prioritize** patient-centric reforms to ensure digital innovation leads to better healthcare experiences and improved affordability





# PLENARY SESSION



Igniting Medical Value Travel (MVT) and  
Building the Heal in India Brand

KNOWLEDGE  
PARTNER





## Leaders Speak

### ‘India needs strategic interventions to realize the full potential of medical tourism’



#### Dr. Om Manchanda

Treasurer, NATHEALTH  
MD, Dr. Lal Path Labs Ltd.

#### Understanding the Medical Value Travel Opportunity

Medical Value Travel, previously known as medical tourism, represents a significant opportunity for India's healthcare sector. India offers an exceptional value proposition by providing quality healthcare at a fraction of the cost compared to many other markets, particularly developed countries. Despite this advantage, the full potential of medical tourism remains largely untapped, requiring strategic interventions to realize the opportunity.

#### Key Barriers Hampering Growth

Several critical barriers currently limit India's success in the medical tourism sector. The fragmented nature of the value chain creates a disjointed patient experience, with hospitals, travel arrangements, and visa processes operating as separate entities without cohesive integration. This lack of professionalism in combining these elements prevents the seamless experience international patients expect.

Additionally, there exists limited awareness about the quality of Indian healthcare in potential markets, particularly developed countries. Currently, India's medical tourism is heavily dependent on patients from a few countries like Bangladesh and certain African nations, indicating a need for broader outreach.

The payment mechanism presents a significant challenge, as international insurance companies may not recognize or provide reimbursements for treatments received in Indian healthcare facilities, creating financial barriers for potential patients.





### **Leveraging India's Existing Advantages**

India already possesses several elements needed for success in medical tourism. The country offers established quality healthcare systems and services at significantly lower costs compared to Western alternatives. South India appears particularly well-positioned in this sector, with numerous JCI-accredited hospitals across southern states.

While connectivity to some regions remains challenging, there is an opportunity to strategically focus on countries where direct transportation links already exist, creating natural initial target markets for the "Heal in India" initiative.

### **Creating an Institutional Framework**

The most significant missing element appears to be an institutional framework to connect the various components of medical tourism. A high-powered coordinating body—either government-sponsored or through private associations—could provide the necessary leadership and coordination. This organization would require substantial resources to effectively market Indian healthcare services internationally, similar to the "Incredible India" tourism campaign.

Establishing either a self-governing mechanism or appropriate regulations to address potential grievances would build trust among international patients. This three-pronged approach—creating a coordinating body, mapping connectivity to target markets, and empowering this organization with marketing resources—could help India realize its potential in global medical tourism.

The "Heal in India" initiative, though relatively nascent compared to the longer-standing "Make in India" campaign, can build on existing successes while addressing the specific challenges of healthcare services. With a strategic focus on integrating the fragmented value chain, raising international awareness, and resolving payment challenges, India can establish itself as a premier destination for global healthcare services.



## Leaders Speak

### 'It's important to review global lessons & study countries who have successfully tapped the medical value travel market'



#### Ms. Aarushi Bhatnagar

Senior Health Economist, World Bank

For India to be a successful Medical Value Travel destination, it is important for the sector to indulge in peer to peer best practice sharing and also studying global lessons. The stakeholders should have the latest view of the MVT destination map—countries, who have effectively tapped the market with a focus on specific case studies.

#### India's Competitive Position and Challenges

India attracts 700,000 international patients annually, ranking third in affordability with procedure costs 50-90% lower than other destinations and sixth in service quality, with an increasing number of JCI-accredited facilities. However, this cost advantage faces challenges from regional and aspirational competitors. Destination choices for medical value travelers depend on quality, connectivity, integrated services, and holistic wellness offerings beyond affordability.

#### Global Trends in Medical Value Tourism

Global medical value tourism emphasizes horizontal and vertical service integration. Horizontal integration spans pre-travel services (promotion, financing, diagnostics), on-site care (clinical services, hospitality, logistics), and post-treatment support (telemedicine, recovery care). Vertical integration incorporates evidence-based alternative therapies for holistic wellness, an area where India holds potential with AYUSH systems.

A seamless patient journey requires integration across promotion, financing (including international insurance), connectivity, medical visas, diagnostics, logistics (translation, transportation), high-quality clinical services, and post-treatment wellness support. Coordination of the value chain remains essential for a competitive edge.



## Lessons from Leading Destinations

**Thailand:** The country has invested 6-7% of GDP in healthcare through decades of reforms, leverages public-private partnerships with its tourism department and board of investments to expand markets beyond Southeast Asia to Bhutan and Gulf Cooperation Council (GCC) countries. Strategies include:

- Extension of visas from 30 to 90 days for neighbors and China.
- Bilateral agreements with new markets to facilitate patient inflows.
- Culturally-sensitive services in partnerships with five-star hotels.
- Boost in investments since the 1970s in tourism infrastructure.

**Turkey:** The country too has been investing around 6-7% of GDP in healthcare since the early 2000s, and has developed high-quality infrastructure and workforce through public-private partnerships, offering costs 50-70% lower than the European markets. Strategies include:

- Using the proximity to Europe, Middle East, and North Africa, with visa-free access for 70 countries and a simplified e-visa process.
- Logistical support through discounts by the national carrier and hospital-hotel collaborations for bundled packages.
- Numerous JCI-accredited hospitals with advanced technology.

**Latin America:** The Tourist Medical Portal promotes Latin America as a hub for US and Canadian patients through public-private collaborations, ensuring seamless pre- and post-travel services, including diagnostics and recovery care.

**Mayo Clinic (USA):** The Mayo Clinic integrates conventional medicine with research-backed alternative therapies, offering holistic healing for cardio-metabolic and cardiothoracic services, highlighting wellness in medical tourism.

### Opportunities for India

- Targeting of higher-paying markets through coordinated branding and promotion.
- Creating seamless patient journey with integration of pre-travel diagnostics, financing, on-site logistics, and post-treatment wellness.
- Enhancing the connectivity with major Indian cities and improved flight networks.
- Focus on quality, accreditation, workforce development, and holistic wellness.

Adoption of global lessons can elevate the sector's growth trajectory by 15-20%. These efforts align with achieving Universal Healthcare access and economic prosperity, advancing Viksit Bharat by 2047.



## Leaders Speak

### 'To become a Medical Value Tourism leader, India needs to identify the key MVT opportunities and the critical success factors'



#### Mr. Parijat Ghosh

Asia Pacific Leader for Healthcare & Life Sciences,  
Partner of Bain & Company

#### Global Market and India's Current Position

Medical value tourism constitutes a global market valued at USD 200 billion, driven by an aging global population, a rising non-communicable disease (NCD) epidemic, and strained healthcare systems worldwide. India attracts 700,000 international patients annually, ranking third globally in affordability with procedure costs one-fifth to one-tenth of those in other destinations and sixth in service quality, supported by an increasing number of Joint Commission International (JCI)-accredited facilities.

The "Heal in India" campaign, inspired by "Make in India," capitalizes on India's service sector strengths. Regulatory measures, including simplified visa processes and faster turnaround times, sustain a 15-20% annual growth rate. Strategic interventions remain essential to amplify this trajectory.

#### Strategic Interventions for Growth

Six key strategies aim to transform India's medical value tourism sector:

- 1) Diversifying Source Markets:** Patient inflows primarily originate from Bangladesh, the Middle East, and Africa. Expansion to new markets requires a coordinated campaign to showcase India's clinical expertise and service capabilities across diverse regions.
- 2) Strengthening the Heal in India Campaign:** Beyond affordability, emphasis on clinical excellence, convenience, compliance, and service quality is necessary. A collaborative government-private sector mission can position India as a multi-dimensional healthcare destination.
- 3) Government-to-Government Partnerships:** Current patient inflows largely involve out-of-pocket spending. Accessing payer-funded pools necessitates cross-country interoperability through Government partnerships, enabling premiums paid in one nation to cover treatments in India.



**4) Enhancing Patient Experience:** India's Medical Tourism Index ranking suffers from inconsistent patient experiences across care, logistics, accommodation, and pre/post-procedure support. Standardization of these elements and establishment of redressal mechanisms are critical for improvement.

**5) Infrastructure Investment:** Domestic healthcare access gaps underscore the need for high-quality infrastructure. Public-private partnerships (PPPs) and increased National Accreditation Board for Hospitals (NABH) certifications can align facilities with global standards, attracting international patients.

**6) Expanding Beyond Curative Care:** Incorporation of preventive and wellness services, particularly through AYUSH systems, broadens the sector's scope. Integration of alternative medicine pre- and post-procedure enhances India's appeal as a comprehensive healthcare destination.

### **Economic and Social Impact**

Medical value tourism contributes to Viksit Bharat by generating employment, boosting economic growth, and elevating India's global healthcare reputation. Growth in this sector supports domestic infrastructure development, addressing the 1.2 hospital beds per thousand population in states like Tripura, compared to 2.3 in Sikkim and 2.1 in Goa. Investments in medical education, with Tripura offering 1,073 seats across MBBS, MD/MS, and allied health programs, ensure a skilled workforce to sustain this expansion.

### **Collaborative Path Forward**

Achievement of medical value tourism's full potential requires collaboration among public and private stakeholders, as advocated by NATHEALTH. Strategies—diversifying markets, enhancing branding, forging international partnerships, improving patient experiences, upgrading infrastructure, and embracing wellness—align with the summit's call for collective action.



## Panel Discussion

### MODERATOR:

**Mr. Parijat Ghosh**, Asia Pacific Leader for Healthcare & Life Sciences, Partner of Bain & Company

### SPEAKERS:

- **Dr. Om Manchanda**, NATHEALTH Treasurer, and MD, Dr. Lal's Path Labs Ltd.
- **Ms. Aarushi Bhatnagar**, Senior Health Economist, World Bank
- **Ms. Kanoko Oishi**, Vice Chairman of MEJ and President and CEO of Mediva Inc
- **Dr. Upasana Arora**, Managing Director, Yashoda Super Speciality Hospital Pvt. Ltd.
- **Dr. Ankit Thakker**, Executive Director and CEO, Jupiter Hospital
- **Dr. Ritu Garg**, Chief Growth and Innovation Officer, Fortis Healthcare Ltd.





**Ms Kanoko Oishi**

Vice Chairman of MEJ and President & CEO of Mediva Inc

While India retains a strong cost advantage in the medical value travel (MVT) sector, this edge is increasingly being challenged by regional and aspirational peers. To stay competitive, India must recognize that cost alone is no longer the sole driver of patient decision-making. Globally, markets are evolving toward integrated healthcare ecosystems that deliver not just curative care but a

holistic healing journey—from financing and promotion to pre-diagnostics, post-treatment recovery, and wellness. Countries like Thailand and Turkey have shown how strategic investments in public health systems, hospitality linkages, and visa simplifications can dramatically enhance their MVT attractiveness.

For India, improving stakeholder collaboration across healthcare, tourism, hospitality, and aviation will be key to building a seamless patient journey. Enhanced international accreditation, smarter market outreach, and service quality elevation are all critical levers.

#### **Key focus areas to create step-change impact**

- **Invest in integrated patient pathways**—pre-care diagnostics, visa support, telehealth, post-care recovery—through public-private coordination.
- **Enhance quality benchmarks** by expanding internationally recognized accreditations like JCI.
- **Leverage India's alternate medicine strength** by embedding AYUSH-based, evidence-backed therapies into MVT offerings.
- **Tap into new high-value source markets** beyond the current low-income geographies by strategic branding and global outreach.
- **Boost connectivity infrastructure**—air links, digital health access, and logistics—to rival global competitors.
- **Foster government-to-government agreements** that enable portability of insurance and long-term bilateral collaboration.
- **Expand and skill the health workforce**, not just clinicians but also ancillary service providers who are critical to delivering superior MVT experiences.

By aligning all key stakeholders—government, private providers, investors, and facilitators—India can move from incremental growth to becoming a global leader in the MVT space. India is becoming a top choice for medical tourists, offering quality treatment at affordable prices. The government's new MVT digital portal aims to make it easier for international patients to access care. But to truly build the Heal in India brand, what matters more—more accredited hospitals or a focus on high-value, specialized treatments?



Medical Value Travel (MVT) offers India a strong strategic advantage with its ability to deliver world-class healthcare at a fraction of global costs. However, this potential remains underutilized due to several key barriers. To truly build the Heal in India brand, India needs to focus on coordinated efforts, stakeholder collaboration, and smart policy interventions.

### Key challenges to be addressed

- **Fragmented patient journey** – Lack of an integrated ecosystem across hospitals, travel, and visa processes creates a poor patient experience.
- **Limited global awareness** – India’s healthcare quality and affordability are not effectively communicated in key international markets.
- **Weak stakeholder alignment** – There is insufficient collaboration between hospitals, facilitators, government bodies, and service providers.
- **Insurance and reimbursement gaps** – Many international insurers do not recognize or reimburse treatments done in India.
- **Lack of targeted outreach strategy** – Overdependence on a few countries; there is no clear roadmap to tap into high-value or new markets.

Overcoming these barriers through strategic planning, digital enablement, and unified branding will be critical to making India a global leader in medical value travel.

### A Unified National Framework for “Heal in India”

To unlock the full potential of medical value travel, India needs a national-level coordinating framework dedicated to the “Heal in India” mission. Just as the “Incredible India” campaign brought together multiple stakeholders to showcase Indian tourism to the world, a similar centralized initiative is required to bring cohesion to India’s medical travel ecosystem. Currently, hospitals, facilitators, government agencies, and tourism departments operate in silos. A central body could bridge these gaps—mapping international patient needs, ensuring quality control, promoting transparent pricing, and supporting digital connectivity across all stages of the patient journey. From simplifying medical visas to standardizing the care experience, this kind of organized approach would not only streamline operations but also enhance trust and visibility globally. It’s time India shifts from scattered efforts to a unified, strategic direction that highlights its world-class healthcare system.





## Tapping into Untapped Geographies



**Dr. Upasana Arora**  
Managing Director, Yashoda Super Speciality Hospital  
Pvt. Ltd.



**Dr. Ankit Thakker**  
Executive Director and CEO, Jupiter Hospital

India has made strides in attracting medical travelers from a handful of countries—primarily in South Asia, the Middle East, and parts of Africa. However, this narrow focus makes the sector vulnerable to geopolitical shifts and regional competition. The next wave of growth lies in expanding reach to less tapped yet high-potential regions such as Central Asia, East and West Africa, Eastern Europe, and Southeast Asia. These regions often lack affordable and reliable healthcare infrastructure and are actively seeking overseas options. India's competitive edge in cost, quality, and culturally compatible care makes it an ideal partner. However, unlocking these markets requires dedicated outreach, medical diplomacy, local representation, and cross-cultural patient engagement strategies. By diversifying its global footprint, India can build a more resilient medical travel ecosystem and reduce dependency on just a few international corridors.

### Accreditation and Patient Trust

When patients choose to travel abroad for medical treatment, trust becomes the most critical factor. Global accreditations like JCI are currently seen as gold standards and heavily influence patient decisions. While India has made efforts to promote NABH accreditation, the awareness of it internationally is still limited. There is an urgent need to elevate the credibility of Indian healthcare institutions through transparent and well-recognized quality benchmarks. India could develop a tiered rating system—akin to hotel star ratings—that combines clinical outcomes, infrastructure quality, patient reviews, and accreditation status. This would make it easier for international patients to make informed choices and would help smaller hospitals also compete fairly based on objective criteria.

In the long term, increasing the number of NABH-accredited institutions and ensuring the visibility of these certifications on global platforms can position India as a safe and high-quality destination.





## Strengthening India's Global Healthcare Brand

Despite having some of the best clinicians and hospitals in the world, India still struggles to communicate a compelling and unified global brand in healthcare. There is no lack of skill or success stories, but there is an absence of structured storytelling. The global narrative must go beyond just affordability and highlight excellence in outcomes, technological sophistication, patient safety, and post-treatment care.



**Dr. Ritu Garg**  
Chief Growth & Innovation Officer, Fortis Healthcare Ltd.

Countries like South Korea and Singapore have effectively positioned themselves as premium medical destinations by combining clinical quality with service excellence. India must do the same—amplifying its strengths in tertiary care, robotics, transplant surgeries, and personalized recovery plans, while also showcasing patient testimonials, success metrics, and doctor credentials. A globally consistent brand narrative backed by data, patient trust, and quality infrastructure will help India rise above the noise and become a top-of-mind destination for medical tourists worldwide.

## Driving Growth through Bilateral Agreements

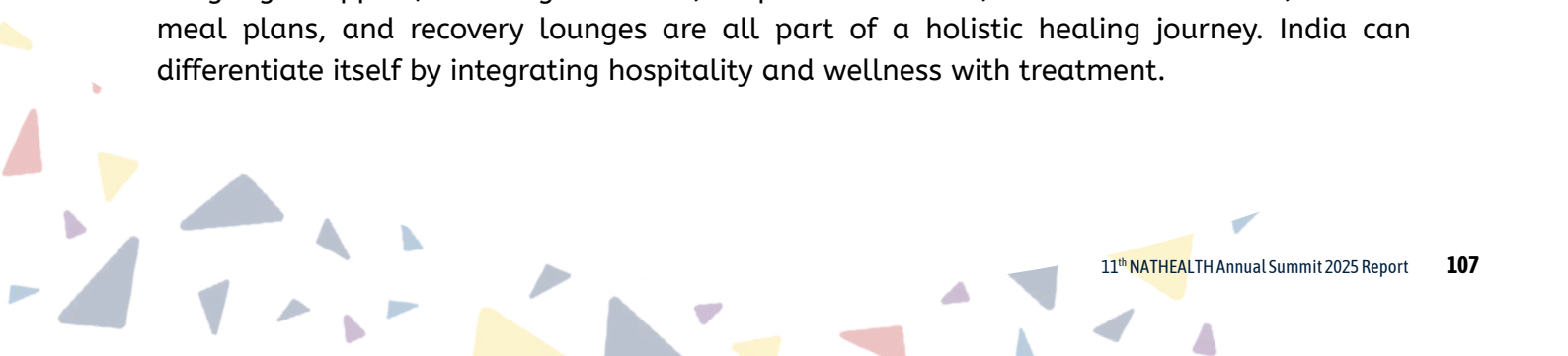
Policy-level interventions can dramatically accelerate the growth of medical value travel. Bilateral government agreements, especially with countries lacking robust healthcare infrastructure, can open the floodgates for inbound patient flow. These agreements could cover visa liberalization, insurance tie-ups, reimbursement models, and even subsidized care for certain categories of patients.

Government-to-government arrangements also carry a level of trust that individual hospitals or facilitators cannot offer. For example, if India signs a healthcare MoU with an African or Central Asian nation, it can lead to structured referral pathways, official patient exchange programs, and even training of foreign medical professionals in India. Such formalized partnerships create long-term pipelines of patients, boost foreign relations, and ensure a steady and organized growth path for Indian healthcare exports.

## Creating a Holistic Patient Experience

The journey of a medical traveler does not begin at the hospital door—it starts the moment they begin looking for options. This is why medical value travel must evolve into a 360-degree experience, not just a clinical transaction.

Language support, concierge services, airport facilitation, medical translators, custom meal plans, and recovery lounges are all part of a holistic healing journey. India can differentiate itself by integrating hospitality and wellness with treatment.





For example, recovery packages could include Ayurveda therapies, mental health counseling, and spiritual retreats that aid healing. Seamless coordination between hospitals, travel partners, hotels, and facilitators can ensure that patients and their families feel cared for at every step. When care goes beyond the surgery and includes emotional comfort and cultural respect, it creates lasting goodwill and word-of-mouth promotion that no marketing campaign can buy.

## Recognizing the Power of Traditional Medicine

India's advantage doesn't lie only in modern medicine, but also in time-tested healing systems like Ayurveda, Yoga, Unani, Siddha, and Homeopathy. These traditional medicine streams are globally recognized for their preventive and wellness benefits, especially for chronic conditions and post-surgical recovery.

Integrating AYUSH offerings with modern hospital care can create a distinctive Indian healthcare model that appeals to a broader base of patients. For example, a cardiac patient may choose India not just for the bypass surgery but also for the post-op yoga rehabilitation. Combining the best of both worlds—cutting-edge technology and traditional wisdom—allows India to offer a unique value proposition that few other countries can match.

## Learning from Global Best Practices

India does not need to reinvent the wheel—it can learn from countries that have successfully scaled their medical travel industries. Japan, for instance, has created a seamless medical tourism model that blends cutting-edge treatment, Government-backed marketing, and tourism infrastructure into a single package. Thailand has done something similar with its luxury wellness retreats and personalized medical concierge services.

These countries have aligned their ministries of health, tourism, and foreign affairs to provide a frictionless experience. India has the human capital, clinical talent, and hospitality DNA to create something even more powerful. What's needed is an ecosystem mindset—where hospitals, facilitators, travel agents, insurers, state governments, and central agencies collaborate instead of competing. Public-private partnerships, targeted incentives, and a unified digital platform can help replicate and even surpass global benchmarks.

India stands at a strategic inflection point in the global \$200+ billion Medical Value Travel (MVT) market. With growing global demand driven by aging populations, rising non-communicable diseases, and stretched healthcare systems, India's strong value proposition - high-quality care at low-cost positions it as a natural leader. Post-COVID recovery has been encouraging, with over 700,000 annual MVT arrivals bolstered by increasing JCI-accredited facilities and enhanced affordability.





However, to shift from steady growth to an exponential scale, we must move beyond affordability and align strategy, stakeholder collaboration, and systemic reform to create a stronger, unified Heal in India brand.

### Strategic priorities to help unlock this next wave of growth

- **Diversify source markets** through coordinated international campaigns highlighting India's full healthcare value.
- **Broaden the Heal in India narrative** beyond cost-position India for clinical excellence, service quality, convenience, and compliance.
- **Forge government-to-government partnerships** to enable cross-border payer systems and unlock structured patient pools.
- **Redesign the end-to-end patient journey** for a seamless experience across medical, travel, stay, and post-care touchpoints.
- **Strengthen infrastructure** via targeted public-private investment and global quality certifications like NABH and JCI.
- **Expand into preventive and wellness care**, integrating AYUSH systems to offer holistic healing experiences.
- **Establish a collaborative governance model**, engaging public and private stakeholders to standardize patient care and drive global confidence.

Together, these focus areas can shift India's medical value travel sector from a fragmented growth story to a global leadership position.



# Key Takeaways

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- **Leverage** AI and digital health platforms to enable remote consultations, second opinions, and virtual follow-up care for global patients.
- **Develop** integrated digital portals that let international patients compare hospitals, doctors, and treatment costs—and book services easily.
- **Build** “Smart Health Cities” that combine medical treatment, wellness, rehab, and leisure, offering a complete healthcare ecosystem.
- **Establish** innovation hubs within hospitals to create and showcase affordable, India-made medical technologies.
- **Use** data analytics and multilingual interfaces to personalize patient care and improve global patient satisfaction.
- **Promote** India’s capabilities in advanced medical procedures like robotic surgeries, organ transplants, and regenerative therapies.
- **Adopt** sustainable infrastructure and eco-conscious design in hospitals and wellness centers to attract green-conscious travelers.
- **Train** healthcare professionals in cross-cultural communication to provide empathetic, reassuring care to international patients.
- **Partner** with insurance providers and medical loan services abroad to make financial planning easier for overseas patients.
- **Host** international health conferences, CME programs, and collaborative research projects to position India as a global knowledge-sharing hub.





# OTHER KEY ACTIVITIES



Engaging initiatives held during the Summit



## Certification Ceremony held for the Health Nexus Accelerator Program



### Laying the Foundation for Industry-Ready Health Startups

The Health Nexus Accelerator, a flagship initiative jointly launched by NATHEALTH and the I-Hub Foundation for Cobotics (IHFC), has been instituted to propel late-stage healthcare startups toward scalable impact and market readiness. At the heart of this initiative lies the certification process—a rigorous, structured mechanism that formally validates a startup’s potential to integrate into the broader healthcare ecosystem, attract industry partnerships, and deliver innovation at scale.

### Certification: A Marker of Market-Readiness

Certification under the Health Nexus Accelerator has been granted to startups upon successful completion of a multi-phased program. Designed specifically for ventures that have already crossed initial development hurdles, the certification signals their preparedness to navigate India’s complex healthcare market with maturity, compliance, and operational resilience.

The certificate, awarded on March 19, 2025, marks the culmination of an intensive mentorship-led engagement involving sector-specific curriculum, regulatory alignment, pilot facilitation, and investor readiness. This recognition provides startups with increased credibility among potential collaborators, hospitals, funders, and government bodies, enhancing their chances of long-term sustainability and integration.



## **Pre-Summit and Certification Activities**

The accelerator's momentum was first seen during the pre-summit session, held on March 18, 2025, at the IHFC Wing, IIT Delhi, under the theme "Celebrating Startup-Led Innovation in Healthcare." This session brought together 13 handpicked startups alongside experts from the healthcare and technology sectors. Notable mentors included Manish Sardana (Vygon India), Dhruv Sahai (Carpal AI), Dr. Vikram Munshi (Whitespace Consulting), Dr. Priyanka Bajaj (PATH), and Dr. Ravi Gaur. The engagement offered direct access to market knowledge, strategic insights, and product validation discussions.

The following day, on March 19, 2025, the formal certification ceremony was held, awarding recognition to the first cohort of startups that had successfully navigated the Health Nexus Accelerator. This certification serves not just as a badge of completion but as an endorsement of the startup's capability to scale innovation, align with regulations, and deliver healthcare outcomes effectively.

## **Program Highlights with a Focused Trajectory**

While the certification remained the defining outcome, the accelerator program was built on four pillars—strategic mentorship, regulatory readiness, operational scalability, and stakeholder integration. The selection of 25 startups, spanning MedTech, diagnostics, AI-based platforms, telemedicine, and robotic solutions, was conducted in collaboration with IHFC and evaluated by a panel of eminent industry leaders including Daljit Singh (Former President, NATHEALTH), Gautam Khanna (CEO, Hinduja Hospital), and Rajit Mehta (MD & CEO, Antara Senior Care), among others.

Knowledge modules developed by Athena Infonomics addressed critical transition points such as post-seed funding challenges (the "Second Valley of Death"), market access strategies, and compliance requirements under India's evolving regulatory framework.

### **Interactive Engagements & Pilots**

To support real-world readiness, startups were offered pilot opportunities in partnership with hospitals and R&D centers. A virtual session with Dr. Raajiv Singhal, CEO & MD, Marengo Asia Healthcare, was conducted to plan in-person deployments. The accelerator further facilitated digital knowledge-sharing through an evolving online platform managed by the Unconsult team, aimed at documenting lessons and enabling resource access across cohorts.

### **Pre-Summit Breakfast & Strategic Networking**

A curated Breakfast Session on March 19, 2025, just before the 11th Annual NATHEALTH Summit, offered a unique opportunity for certified startups to engage in informal yet focused dialogue with industry veterans. This session served as a prelude to their formal exposure at the summit, creating connections essential for strategic scaling.



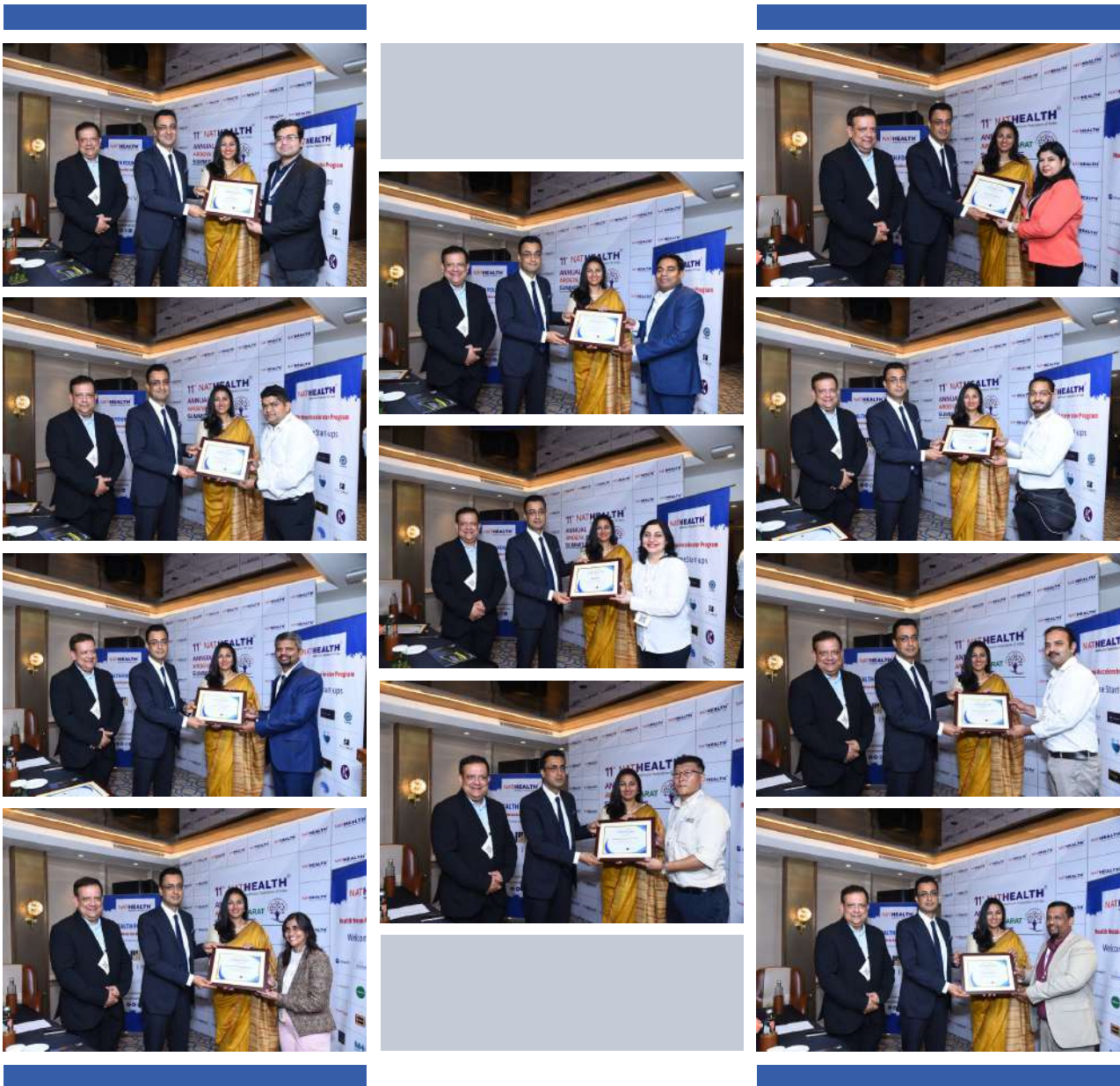


## Looking Ahead: Scaling Certification and Support

With this first cohort now formally certified, NATHEALTH and IHFC plan to expand the program's reach to include up to 1000–1500 startups over the coming years. The certification process will continue to be refined, ensuring it remains a robust and industry-recognized signal of startup readiness. Future cohorts will benefit from deepening collaborations with funding institutions, hospital networks, academic partners, and regulatory authorities.

The Health Nexus Accelerator and its certification model have set a new benchmark in institutionalizing startup-led healthcare innovation in India. By offering a structured pathway to scale, backed by expert validation and formal recognition, the program is enabling the next wave of transformative healthcare solutions to enter the Indian market and beyond.

## A glimpse of the Certification Ceremony



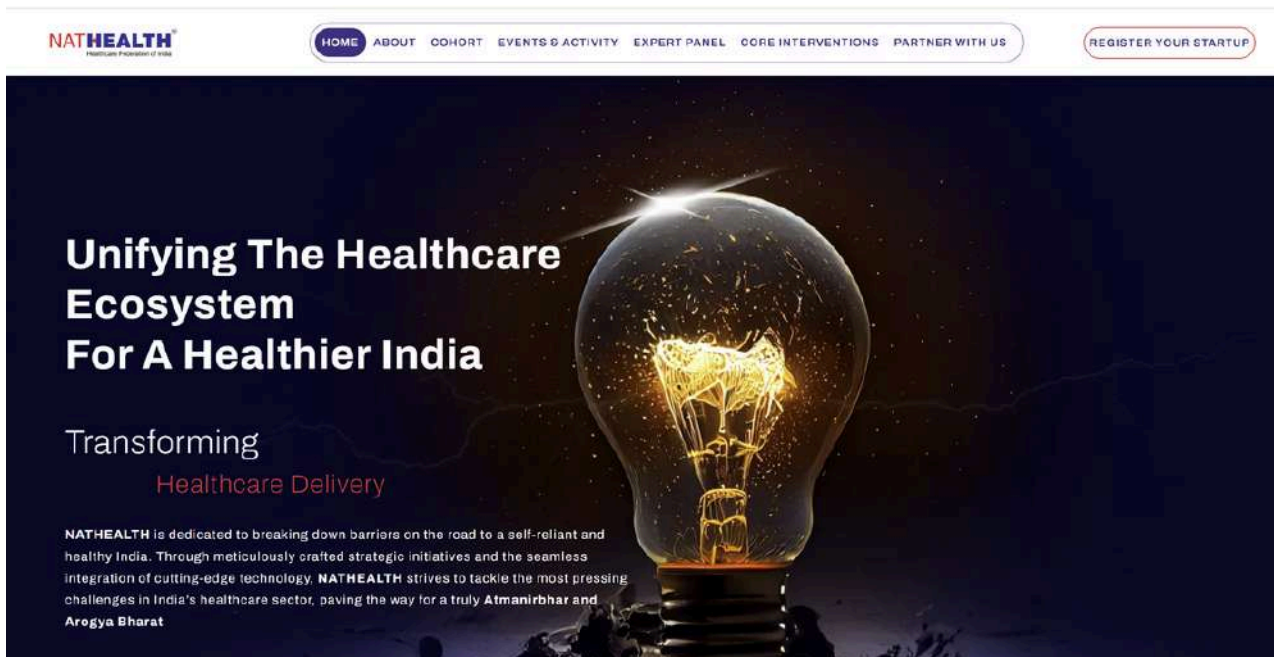


## An exclusive Breakfast Session with startups on scaling Innovations in Healthcare

An exclusive breakfast session with startups ahead of the NATHEALTH Annual Summit. This informal yet insightful gathering brought together a select group of healthcare startups and industry leaders for meaningful discussions on scaling innovations in healthcare. The participating startups (profiles attached) connected with experienced mentors seeking guidance and strategic insights to navigate their growth journey. This session offered great opportunity to engage with emerging healthcare innovators over breakfast, gain early insights into their solutions, and provide mentorship before the summit officially begins.



## Launch of Website - Health Nexus Accelerator Program



At the forefront of India's healthcare transformation, NATHEALTH proudly unveiled the official website of the Health Nexus Accelerator Program at the 11th Annual Arogya Bharat Summit on March 19, 2025. This milestone marked a major step in accelerating healthcare innovation and strengthening support for MedTech, AI, diagnostics, and digital health startups across India. In collaboration with IHFC, IIT Delhi, the accelerator provides structured support to help startups overcome critical barriers—from navigating regulatory compliance to scaling in complex healthcare markets.

### A Transformative Platform for Startups

The new Health Nexus Accelerator website serves as a comprehensive resource hub, connecting early and growth-stage healthcare startups with the mentorship, funding, technical validation, and market access they need to thrive. It reflects the program's mission to foster Atmanirbhar (self-reliant) healthcare innovation that is aligned with India's Digital Health and Atmanirbhar Bharat missions.

### Key Features and Offerings

1. Tailored Startup Support: From TRL 7 to TRL 9, helping innovations reach market readiness
2. Regulatory Guidance: Support navigating DISHA, DPDP, CDSCO, and ISO standards
3. Funding Access: Connections to impact investors and grants up to INR 25 lakhs
4. Technical Validation: Access to clinical testing and pilot programs with leading hospitals
5. Mentorship and Networking: Industry-led workshops, peer learning, and visibility through NATHEALTH channels



## Launch of Website - Health Nexus Accelerator Program

**Why It Matters:** The launch of the Health Nexus Accelerator website is a gateway to India's future in health tech which leverages collaboration across sectors including startups, hospitals, policymakers, and investors. This platform is designed to address real challenges like the "Second Valley of Death," where promising innovations often stall due to a lack of resources or market traction.

**Join the Movement:** NATHEALTH invites innovators, investors, mentors, and healthcare institutions to explore the platform, become collaborators, and help build a world-class, self-reliant health innovation ecosystem.

### How Can You Get Involved?

**Knowledge Sharing:** Guest Faculty, Industry Insights

**Networking and Partnerships:** Supply Chain Expertise, Industry Connections

**Mentorship & Guidance:** Regulatory Support, Market Access

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