MARKET FEASIBILITY REPORT

For: GLOBAL HOSPITAL, PUNE

Prepared by

HOSPACCX

INDIA SYSTEMS

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PROMOTERS OVERVIEW

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EXECUTIVE SUMMARY

Executive Summary

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- Hospaccx India Systems has taken the task of doing a Market and Financial Feasibility survey for the proposed Multi speciality Tertiary care Hospital project in Pune. The objective of the exercise was to assess the potential for the venture.

- Research included
  - ✓ Primary data collection
  - ✓ Secondary data collection
  - ✓ Benchmarking against leading Hospitals and
  - ✓ Analysis by experts having experience in Healthcare Planning and Management.

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OBJECTIVE

Objective

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- To study the existing Market for identifying the possibility and viability of a new Hospital set up and to assess the potential for the venture.

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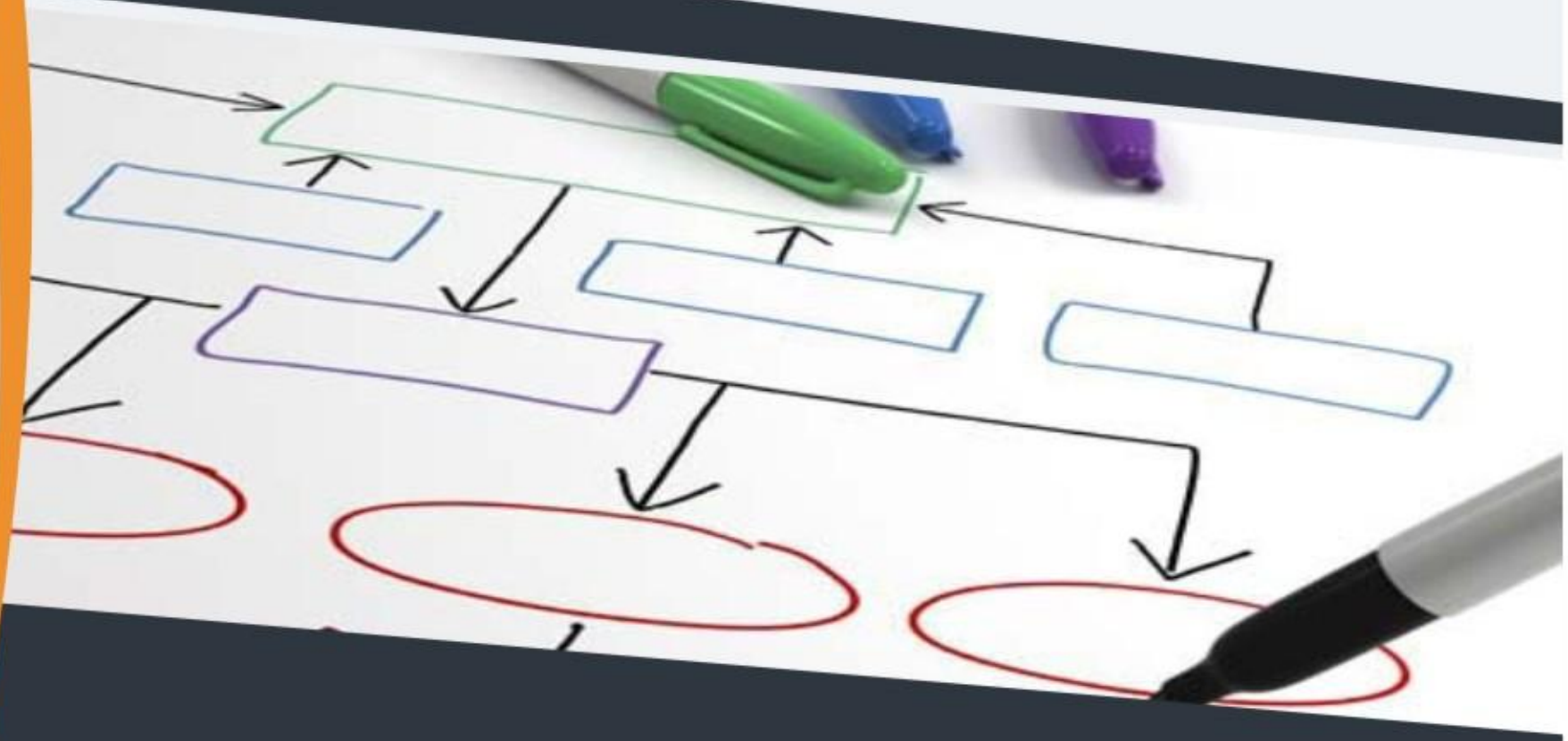

APPROACH & METHODOLOGY

Approach & Methodology

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- To map the present Healthcare scenario in Thane
- Study of Primary and Secondary catchment areas

✓ Primary data:
  - 8 Multi speciality Hospitals of the city
  - 8 Doctors
  - 10 General Public Survey

✓ Secondary Data:
  - Census Reports
  - WHO Health Report
  - Directorate of Health Govt., Maharashtra And many more

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HEALTHCARE MARKET OVERVIEW - INDIA

Indian Healthcare Market

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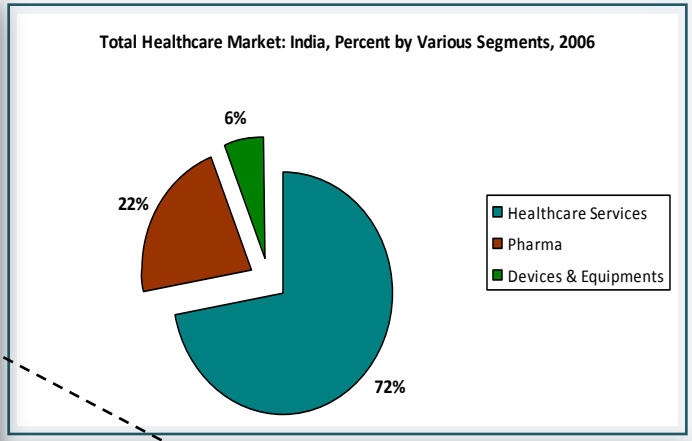

- Market Size in 2011 : $50 billion
- CAGR: 14-16%
- Market Size (2015) Projection: $100 billion
- Reasons for Growth:
  - Concurrent efforts in development of infrastructure
  - Creation of demand for higher levels of healthcare
  - Rising awareness of end users
  - Aggressive launch of innovative insurance / reimbursement and financing policies

Note: *All figures are rounded; the base year is 2011. Source: Frost & Sullivan*

Source: *McKinsey Global Institute, 2011*

Indian Healthcare Scenario

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COMPARISON OF HEALTH CARE SCENARIO:

India accounts for 1/6th of the world's population but only 1/6th of India's billion people have access to affordable health care.

	HEALTH EXPENDITURE % GDP	DOCTORS/1000	HOSPITAL BEDS /1000
World	2.6	1.5	3.3
Developed countries	6.1	2.8	7.2
India	5.2	0.47	0.9

	INDIA
Health expenditure % of GDP	5.2
Governments share of total expenditure	4.4
Per capita spending on health($)	96

Source: *Health scenario in India, IAS 2007*

Role of Government in Healthcare Sector

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PARTICULARS	PERCENTAGE
Total expenditure on health	5.2% of GDP
Public health investment	0.9% of GDP
Budget allocation for health	1.3% of central budget
Government expenditure	25%
State budgetary allocation	5.5%
Central contribution to state	15%

India's health budget has gone by ` 4000 Crore to 30,702 Crore (2010)

Healthcare Drivers

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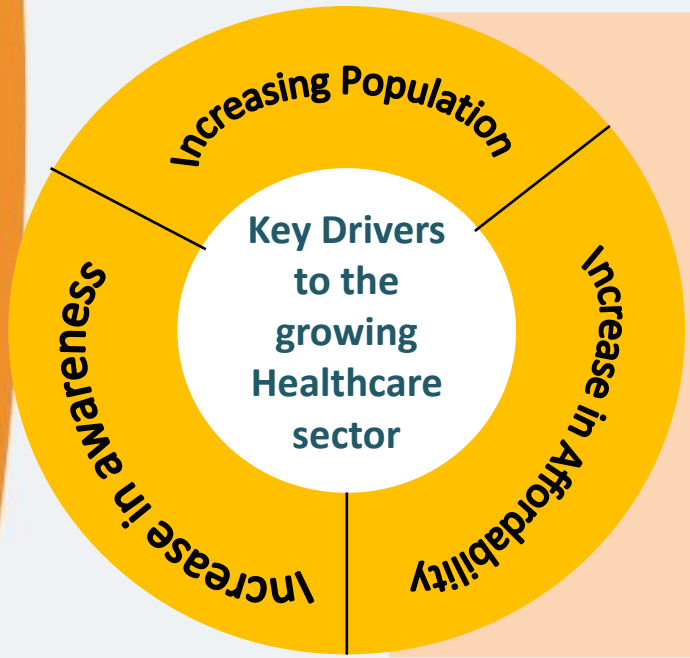
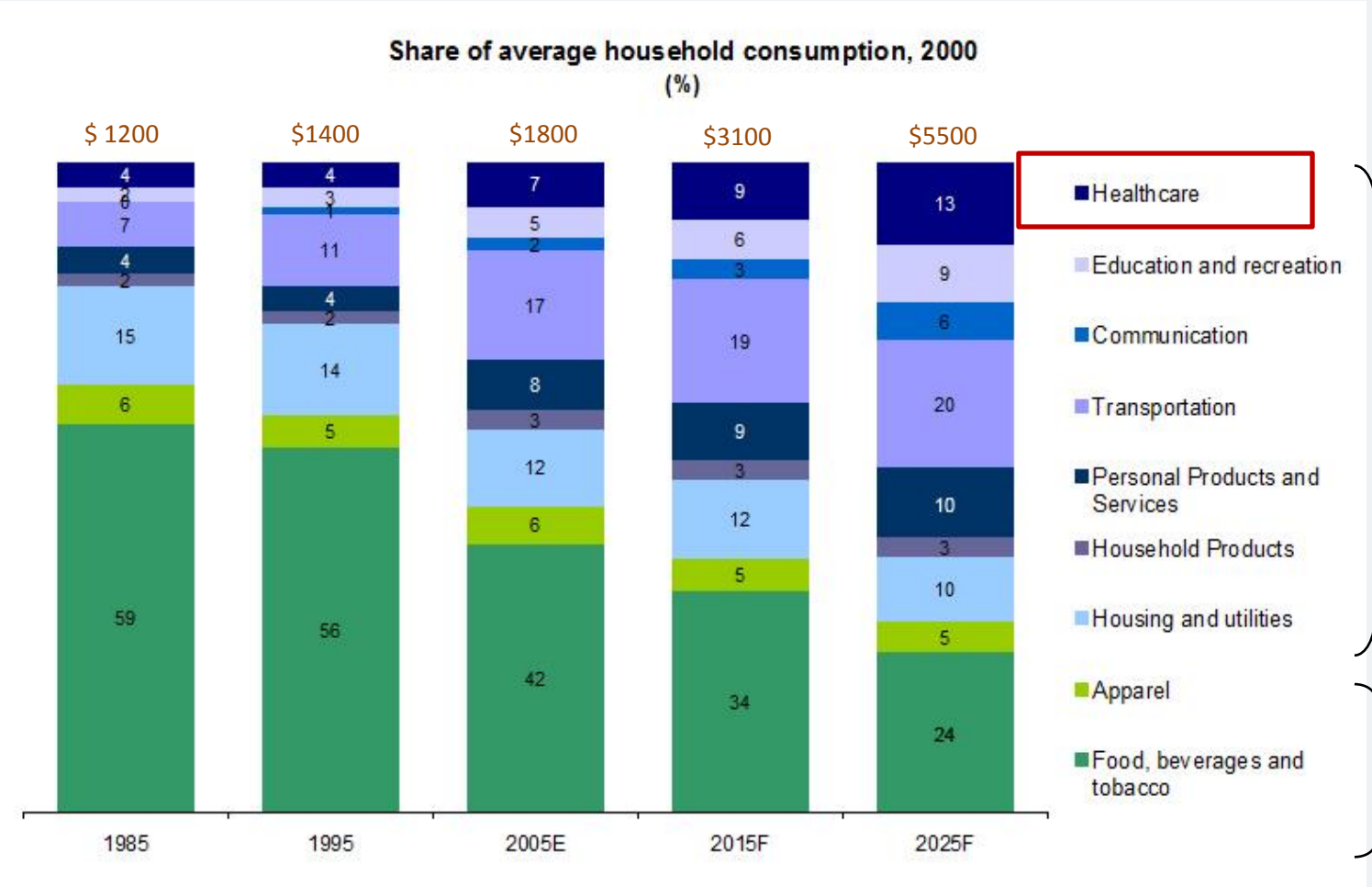


Resultant Factors

- Changing disease patterns
- Increase in adoption of health insurance
- Inclination towards healthcare expenditure

Source: *McKinsey Global Institute, 2007*

India's Share of Wallet is Shifting from Basic Necessities to Discretionary Items



Better economic conditions are making many items to move from discretionary to necessities list

Note:

(1) There is no split available between Food, Beverage & Tobacco

(2) E=estimate, F=forecast

Source: *McKinsey Global Institute, 2007*

Private Healthcare Spending in India

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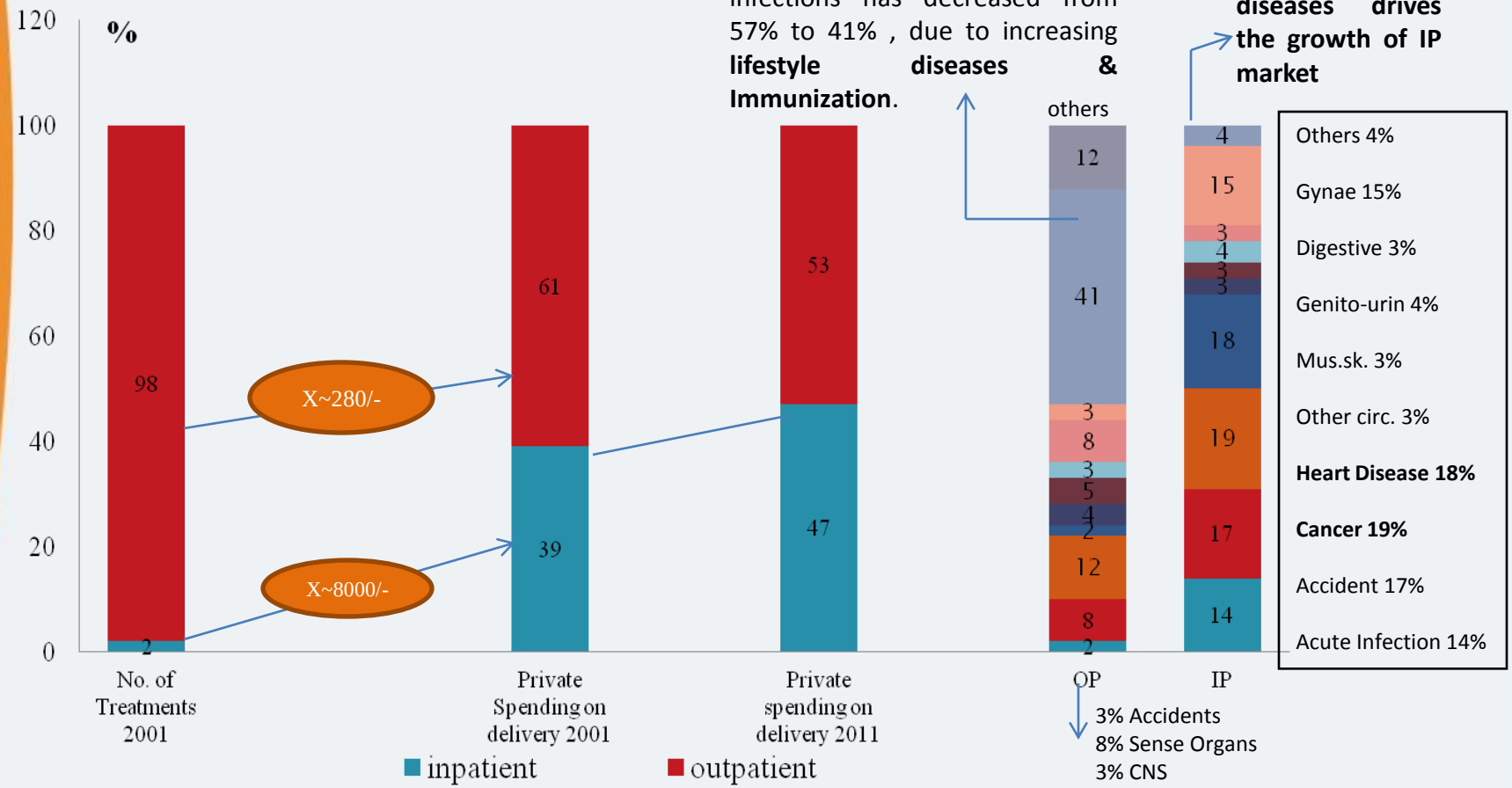
In OP spend, the share of acute infections has decreased from 57% to 41% , due to increasing **lifestyle diseases & Immunization**.

Cancer & Heart diseases drives the growth of IP market



3% Accidents
8% Sense Organs
3% CNS
5% other circulatory disease
4% heart disease and
2%cancer
12% musculoskeletal
8% Asthma
2% Diabetes

A high share of outpatient care in India indicates low levels of affordability and a disease pattern dominated by infections

By 2011, private healthcare spending moves towards greater inpatient spend, i.e. share of hospitalization has increased.

Source: *CII, McKinsey*

Health Status of the Indian Population

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Cancer:

- The total number of cancer cases in India was estimated 924,790 in 2001.
- This is projected to increase to 1,229,968 by 2011 and to 1,557,800 by 2021.

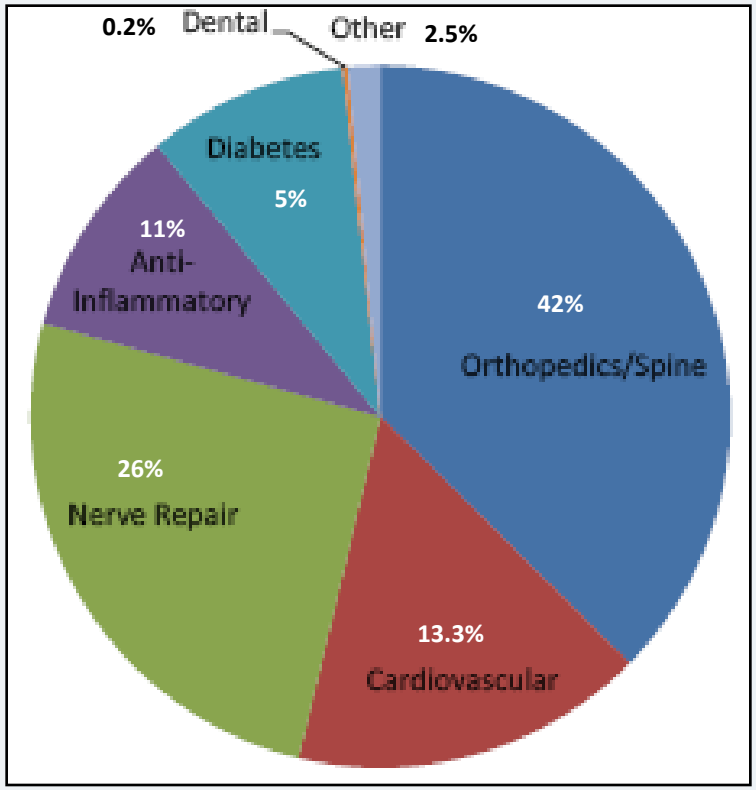
Cardiovascular diseases:

- The mortality rate due to cardiac arrest and related causes was estimated 2.4 million in 1990.
- With increasing urbanization the problem is on the rise.

Hypertension, diabetes and renal diseases:

- These stress and lifestyle related disorders are on the rise.
- The diabetic population in India is projected to increase from 40 million of 2001 to 47 million people in 2010.

Industry Market Drivers



Source: *ICRA Report on Indian Healthcare & TIFAC*

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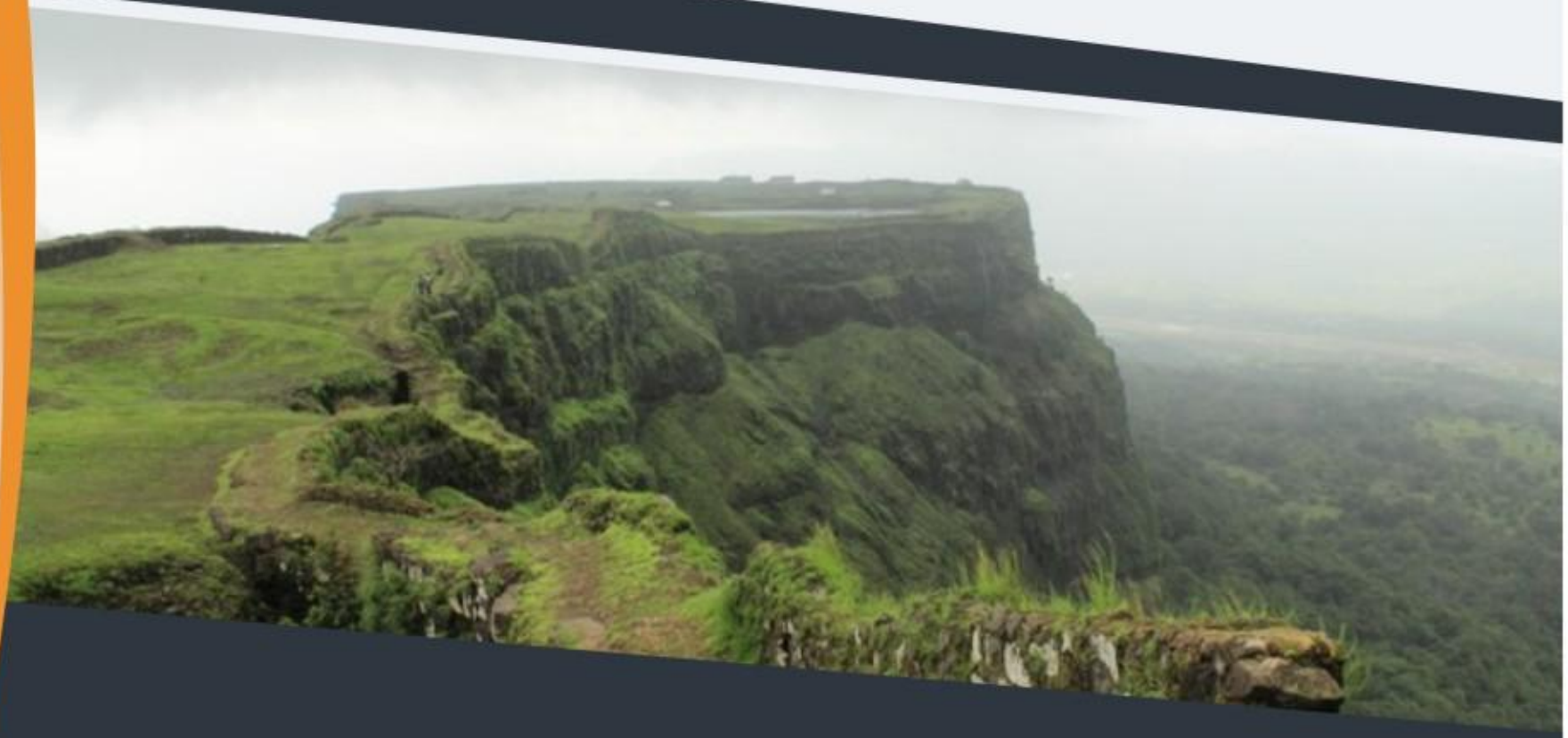

PROFILE OF MAHARASHTRA

Maharashtra State Profile

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RBI Bulletin – August 2006

In 2005-2006 Maharashtra has out performed the competition with 20% of the total corporate investments being made here.

FICCI FDI Survey 2006

Maharashtra No. 1 State for FDI

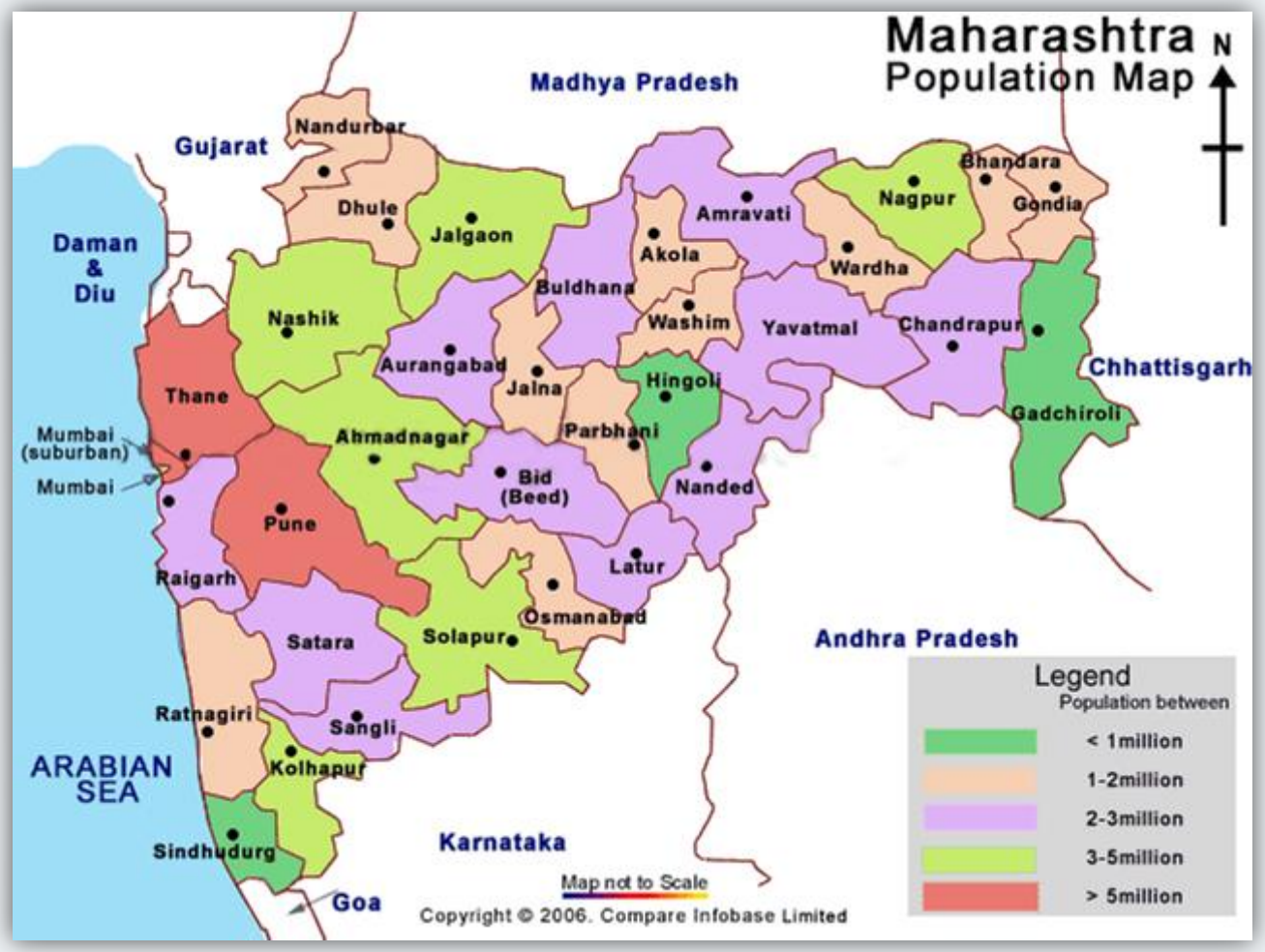
- Most populous and third largest state by area in India.
- Richest state in India, contributing to-
  - 15% of the country's industrial output
  - 13.2% of its GDP in year 2005-06.

<u>Major achievements in last 20 years</u>

- Reduction in
  - Birth rate from 31.1 (1984) to 17.9 (2008)
  - Death rate from 9.4 (1984) to 6.6 (2008)
  - IMR from 76 (1984) to 33 (2008)

Life expectancy increased from 59.6 years to
- 67.9 in Male
- 71.3 in female

Density of Population in Maharashtra



Mumbai, Thane & Pune are densely populated districts in Maharashtra.

Health Infrastructure of Maharashtra

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PARTICULARS	REQUIRED	IN POSITION	SHORTFALL
Sub-centre	12,153	10,579	1,574
Primary Health Centre	1,984	1,816	168
Community Health Centre	496	407	89
Multipurpose worker (Female)/ANM at Sub Centres & PHCs	12,395	12,027	368
Health Worker (Male) MPW(M) at Sub Centres	10,579	9,956	623
Health Assistant (Female)/LHV at PHCs	1,816	3,323	-
Health Assistant (Male) at PHCs	1,816	3,182	-
Doctor at PHCs	1,816	1,191	625
Obstetricians & Gynaecologists at CHCs	407	143	264
Physicians at CHCs	407	41	366
Paediatricians at CHCs	407	99	308
Total specialists at CHCs	1,628	352	1,276
Radiographers	407	294	113
Pharmacist	2,223	1,976	247
Laboratory Technicians	2,223	769	1,454
Nurse/Midwife	4,665	6,150	-

Source: *NHRM report March 2007,mohfw.nic.in*

The Other Health Institution in the Maharashtra

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HEALTH INSTITUTION	NUMBER
Medical College	39
District Hospitals	23
Referral Hospitals	-
City Family Welfare Centre	-
Rural Dispensaries	-
Ayurvedic Hospitals	55
Ayurvedic Dispensaries	469
Unani Hospitals	5
Unani Dispensaries	25
Homeopathic Hospitals	45
Homeopathic Dispensary	-

Source: *NHRM report March 2007,mohfw.nic.in*

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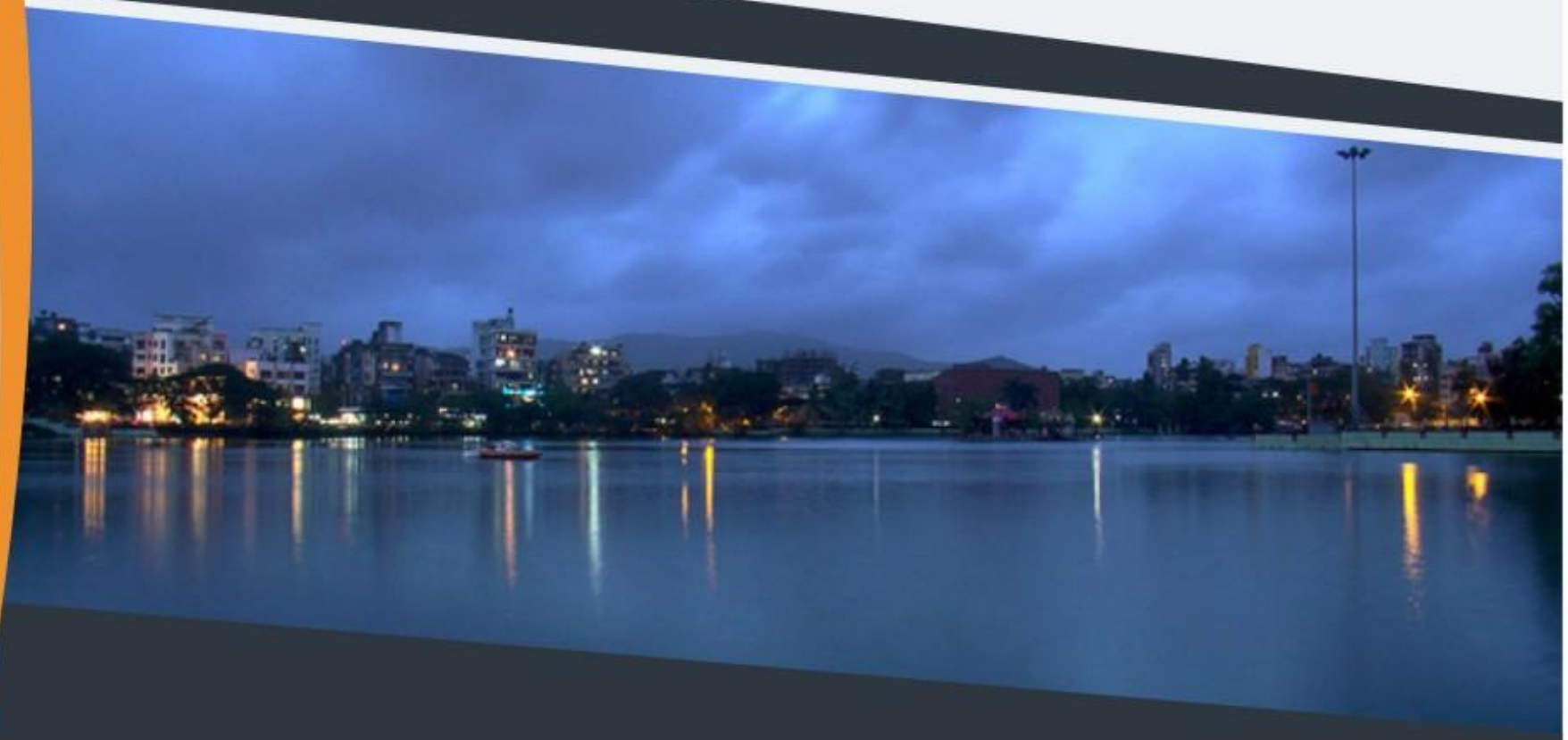
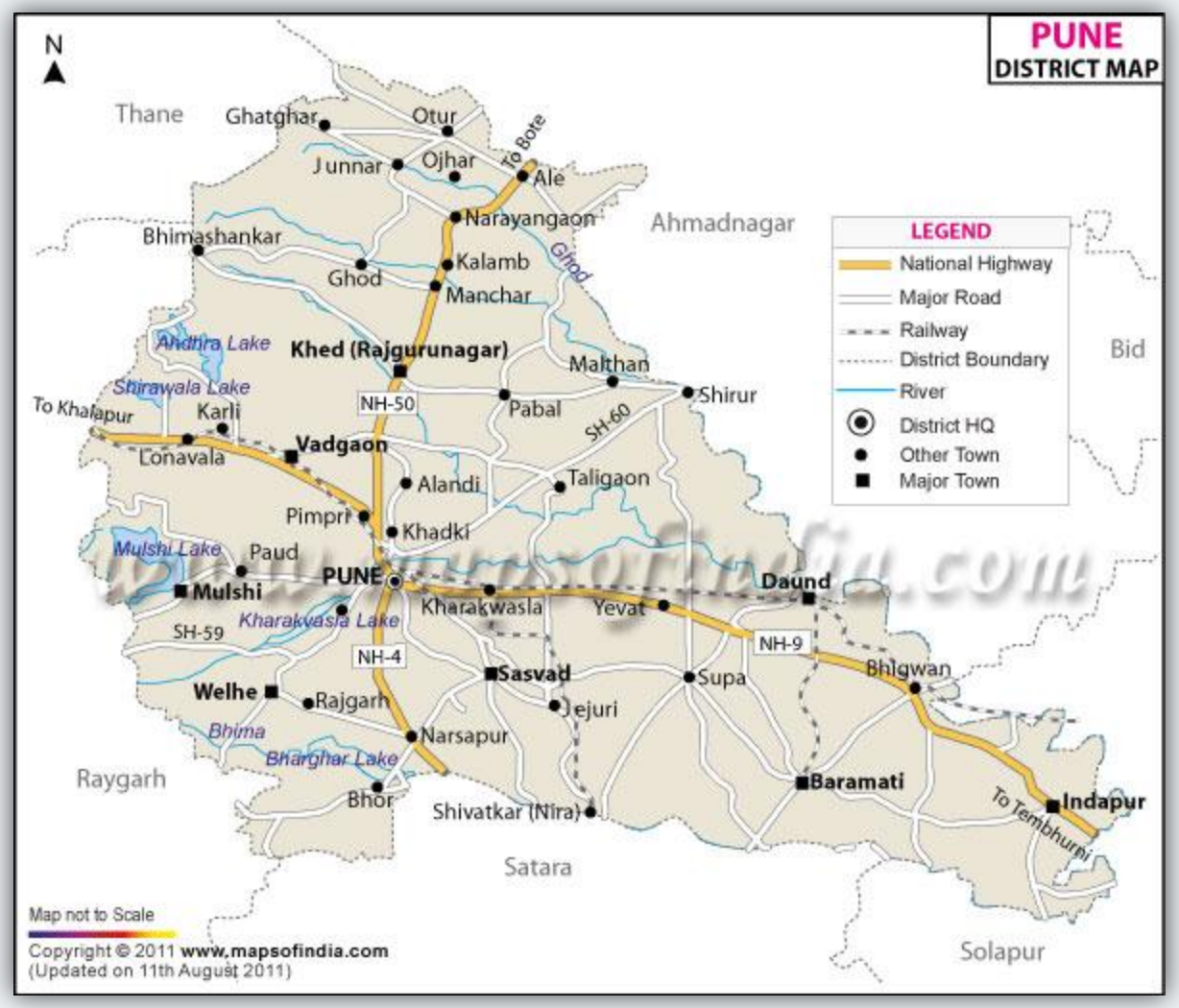


PROFILE OF PUNE

Pune District – An Overview



Profile of Pune

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- Pune is the second largest city in the state of Maharashtra in western India with a population of 5 million.
- It is also the 7th largest city in India and the 8th most populous metropolitan area in India.
- Pune is not just about education and IT anymore. Even healthcare is making its presence felt strongly.
- Pune has a high literacy rate of 80.73%, better health awareness, good paying capacity and willingness to spend on health are better among Pune cites than many other places.
- Pune's Per Capita Income (PCI) is Rs 46,000 which is about 50 % higher than the country's PCI.
- Rising income levels is a key driver for the organized hospitals as it allowed them to ramp up occupancies despite their services being priced at premium.
- The city has big hospitals, Gym and Fitness clubs, Diagnostic Centers, Alternative Medicine centers and Specialty Clinics.
- There is a need to have better emergency care facilities in Pune owing to a number of national highways surrounding the city.

Administrative Department within Pune District

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ADMINISTRATIVE DEPARTMENT	No's
Geographical Areas	15,642 sq. km.
Total Taluka	14
Total Panchayat Samiti	13
Cities	39
Total Villages	1,866

ADMINISTRATIVE DEPARTMENT	No's
Municipal Corporations	2
Municipal Council	11
Gram Panchayat	1407

Source: *Collectorate of Pune district*

Demographic Profile of Pune District

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Number of Households	15,17,041
Household size (per household)	5
Sex ratio (females per 1000 males)	910
Sex ratio (0-6 years)	873
Scheduled Tribe population	-
Percentage to total population	-
Scheduled Caste population	--
Percentage to total population	-

Literacy rate:

Literates	
Persons	72,88,517
Males	5,69,916
Females	4,97,345
Literacy rate	
Persons	87.19
Males	92.72
Females	81.13

Source: *Pune census 2011*

Economic Indicators

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Employment in Agriculture	3,06,643
Employment in Animal Husbandry and Fisheries	-
Employment in Mining and forestry based activities	-
Employment in Rural Industries and other manufacturing	1,22,988
Employment in Services and other activities	2,24,537
Employment/ Unemployment scenario, seasonality and issues	-

Source: *Directorate of Economic & Statistics 2005 , Govt. of Maharashtra*

Taluka wise Population

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TALUKA	AREA (sq.km.)	POPULATION				LITERACY RATE		
		Persons (X1000)	Male (X1000)	Female (X1000)	Sex Ratio	Total	Male	Female
Junnar	1385	304	187	183	976	77%	81%	72%
Ambegaon	1043	187	108	106	987	74.02%	85.96%	62.03%
Khed	1400	283	178	165	927	98%	97%	96%
Shirur	1557	311	161	150	934	72%	77%	66%
Maval	1131	305	160	145	903	75%	80%	69%
Mulshi	1039	127	66	61	921	67.91%	79.70%	55.05%
Haveli	1337	1353	725	628	865	56.17%	68.82%	43.53%
Daund	1290	341	177	164	927	74%	79%	69%
Velhe	497	56	28	28	1008	62.32%	76.75	48.19
Purandar	1103	223	114	109	958			
Baramati	1422	373	193	180	936	75.44%	85.08%	65.25%
Indapur	1468	348	181	168	930	69%	75%	62%
Bhor	892	172	85	86	1011	78%	83%	73%
Pune city	184	1406	1290	2696	917	80.45%	88.34%	71.89%
Total	15642	7232	3769	3463				
Average					943			

Source: *Annual employment report of thane district in the state of Maharashtra for the year 2006-07, District Rural Development Agency, Thane*

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HEALTHCARE MARKET OVERVIEW

Healthcare Market Overview

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PARTICULAR	INDIA	MAHARASHTRA	MUMBAI	PUNE
Population (2011)	1,21,01,93,422	11,23,72,972	1,24,79,608	94,26,959
Female	58,64,69,174	5,40,11,575	1,19,78,450	44,90,597
Male	62,37,24,248	5,83,61,397	66,19,966	49,36,362
Rural	87,37,59,650	6,15,45,441	53,58,484	36,87,243
Urban	3,36,43,772	5,08,27,531	-	57,39,716
No. Households	2,42,03,86,844	1,95,76,736	25,15,589	
Area (Sq. Km)	32,87,263	3,07,713	20925	603
Sex ratio	940	946	857	910
Population Density (per sq km)	382	365	20,925	$603/km^2$
Decadal growth rate	17.64%	15.99%	8.01%	30.34%
Literacy Rate	74.04	82.91	94.7 %	87.19%
Birth Rate (per 1000)	22.5	17.6	14.3	17.3
Death Rate (per 1000)	7.3	6.7	6.8	6.5
Infant Mortality Rate (Per 1000 live Births)	52.9	31	35.12	25
Life Expectancy	66.8	67.2	69.6	68.5
Male	65.77	65.8	67.9	66.7
Female	67.95	68.1	71.3	70.2

Source: *Census 2011*

Deaths Rates

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DISTRICTS	CARDIAC ARREST	CANCER	TRAFFIC & OTHER ACCIDENTS	ACCIDENTAL BURNS
Nashik	1,200	380	640	310
Dhule	533	140	123	161
Jalgaon	1,204	430	454	192
Thane	4,849	575	1,020	359
Mumbai	**17,122**	**3,417**	**4,818**	**1,552**
Pune	**3,993**	**631**	**1',515**	**932**
Ahmednagar	1,149	240	462	330

Source: *Statistical abstract of Maharashtra state, 2006*

Healthcare Indicators

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INDICATORS	TOTAL
Infant Mortality Rate (per thousand live births)	18
Maternal Mortality Rate (per 1 lakh live births)	0.1
Birth Rate	18.6
Death Rate	6

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HEALTHCARE INSTITUTE	No. OF INSTITUTES	SEATS
Medical Colleges	4	540
Dental Colleges	2	200
Ayurvedic Colleges	6	350
Homeopathic Colleges	4	325
Unani Colleges	1	40
Nursing Colleges	6	218
Physiotherapy Colleges	4	140
Occupational Therapy Colleges	---	---

Source: *Government of Maharashtra,Public Health Department, Directorate of Health Services, 2011*

Institution wise Availability of Beds in Pune

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Hospital beds in Pune according to ownership of Hospital:

OWNERSHIP OF HOSPITAL	No. OF Hospitals (2010)	AS A % OF TOTAL BEDS
Government Hospital	55	15.27%
Trust Hospital	60	16.66%
Private Hospital	5	1.38%
Nursing homes	240	66.66%
Total	360	100%

About half of the Hospital in Pune are owned by the private sector i.e Nursing Home indicating that there is an equal contribution of both the Public and Private sector in delivering healthcare services to the dynamic population of the Pune.

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PROFILE OF PCMC

Profile of PCMC

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- The main localities in Pimpri Chinchwad are Chinchwad ,Pimpri, Nigdi, Akurdi and Bhosari.
- Pimpri-Chinchwad is a major industrial hub and hosts one of the biggest industrial zones in Asia Industrialization dates back to 1954 with starting of Hindustan Antibiotics Limited. considering this opportunity MIDC took initiative and bought huge scale land in this area. This town is home to the Indian operations of major automobile companies like Premier Limited Mahindra Navistar, Bajaj Auto, BEL Optronic Devices Limited, TATA Motors (formerly TELCO), Kinetic Engineering, Force Motors (formerly Bajaj Tempo) DaimlerChrysler, Thermax and Autoline Industries. In addition to this, several heavy industries such as Forbes Marshall, ThyssenKrupp and Alfa Laval & Sandvik,Asia have their manufacturing units in the town and also the German company KSB Pumps, swedish bearing company SKF. Rajiv Gandhi Infotech Park hosts several Software and Information Technology majors like IBM India, KPIT Cummins, Tata Technologies, Infosys ,Wipro, Geometric Limited etc.
- There are total 6195 industries are present in PCMC.

Demographic Profile of PCMC

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Pimpri and Chinchwad City	Total	Male	Female
Population	17,29,359	9,45,953	7,83,406
Literates	13,74,986	7,84,984	5,90,002
Children (0-6)	2,16,695	1,16,421	1,00,274
Average Literacy (%)	90.9	94.63	86.37
Sexratio	828		

Source: *PCMC – Pimpri Chinchwad Municipal Corporation*

Pimpri - Chinchwad Area

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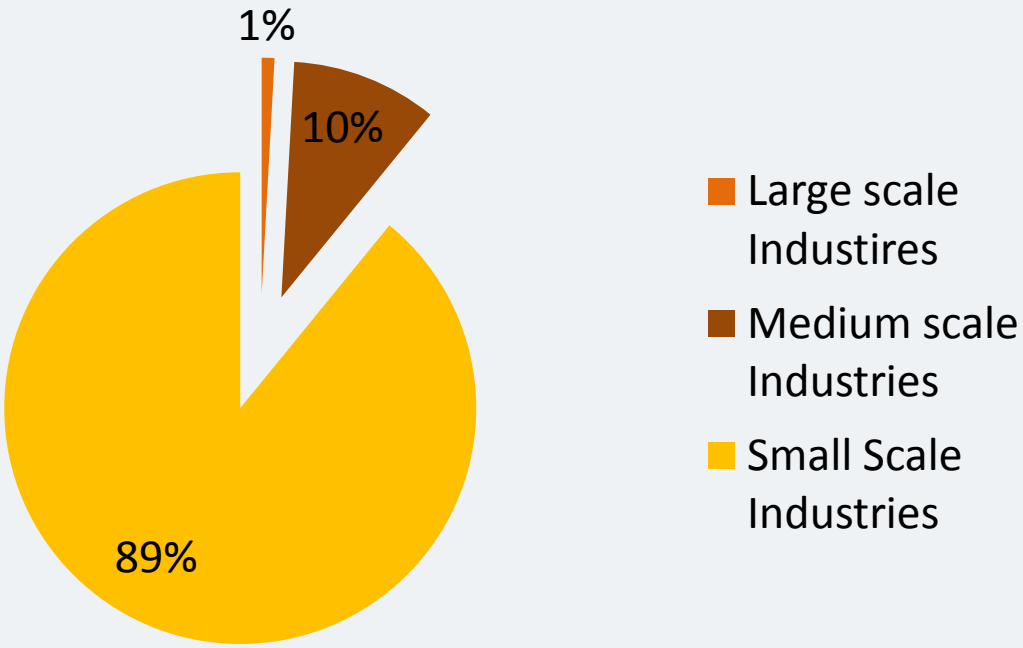
PARTICULARS	AREAS
Pimpri & Surroundings	Pimpri
	Kalewad
	Morwadi
	Phugewadi
	Rahatani
	Pimprigaon
	Ambedkar Nagar
	Sant Tukaram Nagar
Chinchwad & Surroundings	Chinchwad
	Shahu Nagar
	Kalbhor Nagar
	Mohan Nagar
	Chinchwadgaon
	Dalvi Nagar
	Sambhaji Nagar
	Bijali Nagar
Bhosari and surroundings	Bhosari
	Kasarwadi
	Moshi
	Dighi
	Dudulgaon
	Charholic Budruck
Nigdi & Surroundings	Ravet
	Nigdi
	Nigdi Pradhikaran
	Sindu Nagar
	Yamuna Nagar
	Rupee Nagar
	Talawade
	Akurdi
	Krushna Nagar

Industries in PCMC

Industries in PCMC	
Large scale Industries	54
Medium scale Industries	621
Small Scale Industries	5520
Total	6195



Category of Hospital Beds - PCMC Region

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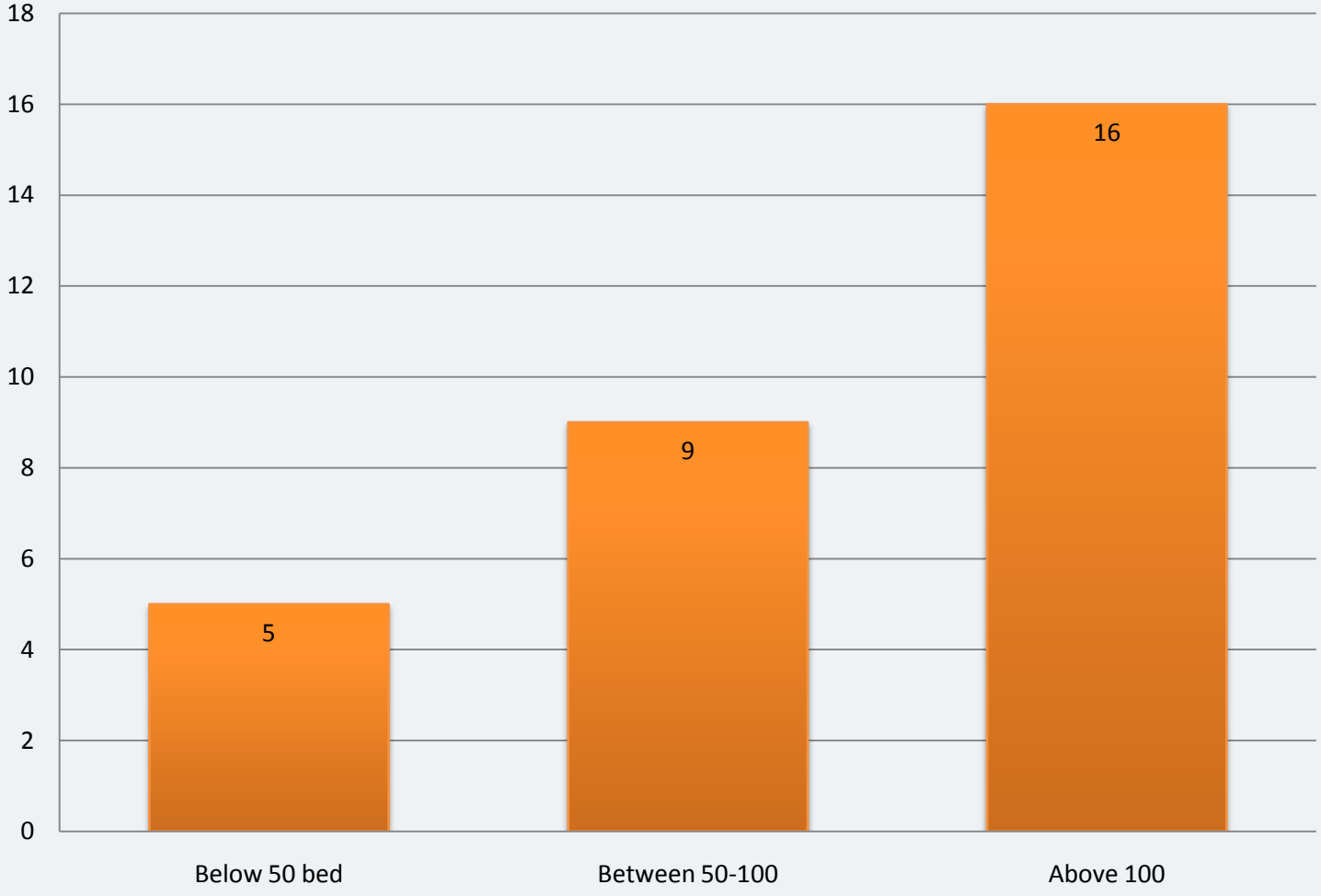

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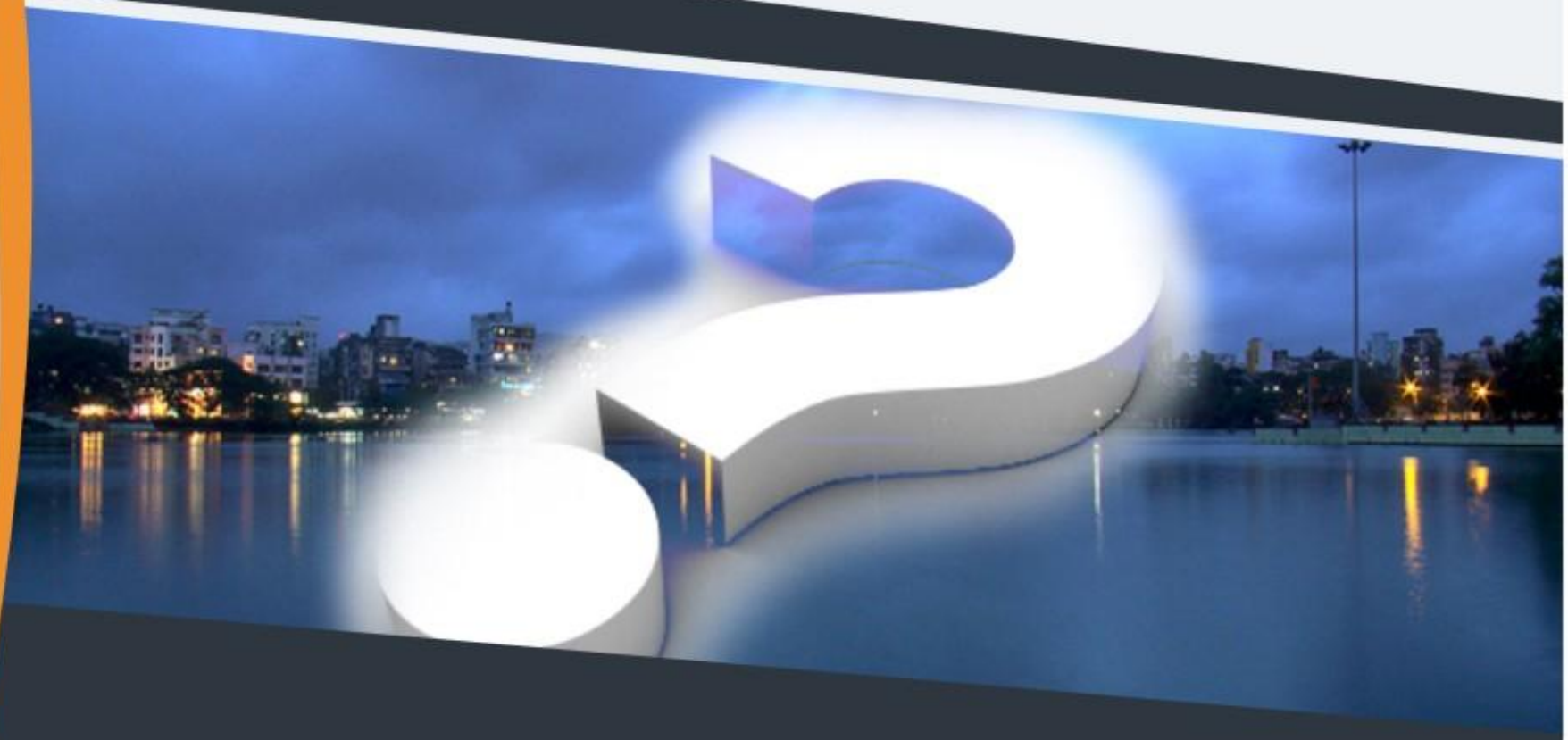

WHY PUNE ???

Why Pune ?

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- Second most densely populated district in Maharashtra.
- Fascinating city with a salubrious climate throughout the year
- 2nd most district with high per capita income after Mumbai in Maharashtra
- Educational Hub of Maharashtra
- Known as “Automobile city” because big auto companies are located
- Sunshine city for medical tourism
- High literacy rate – 87.19%

Demand Scenario

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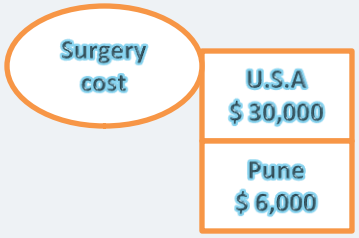
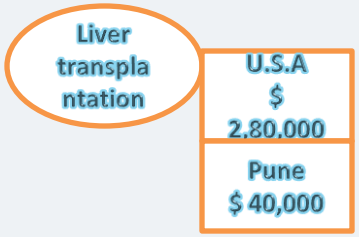
- ✓ The opportunities in Pune city as a healthcare market are fantastic. Pune is becoming a metro. It is fast pacing up with Mumbai and has a huge population base of 5 million, mostly comprising of industrial workers from the BPO, IT and education industry.
- ✓ Rising income levels is a key driver for the organized hospitals as it allowed them to ramp up occupancies despite their services being priced at premium.
- ✓ Low-cost treatment and dental tourism is the ultimate factor in Pune.
- ✓ The Ruby Hall Clinic is one of the prominent and famous hospital in Pune and a leader in the field of surgery and attracting 150 foreign patients a year.
- ✓ Sancheti Hospital has a steady inflow of patients from Spain, Singapore and the Middle East coming in for major hip or knee replacement procedures and spinal surgeries.
- ✓ Only 10% of payment is done through insurance so there is a lot of demand to penetrate the insurance market and rest is through direct payment. This has led to 62% of healthcare expenditure being financed out-of-pocket.
- ✓ The cost of treatment in Pune Hospitals is 1/5 of the cost in Europe and USA.





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1. Demand For Number of beds/1000 population

- Number of beds/1000 population is 1.07 and the world average requirement is 3.96 beds/1000 population with the increasing population and growing healthcare diseases.
- So approximately 15,500 beds needs to be added in order to reach the ratio of 3.96 beds/1000 population.

2. Demand for Accreditation

- There are no hospitals in Pune with JCI Accreditation and only Ruby Hall clinic recently received the NABH accreditation.
- There is a need to go for either JCI or NABH accreditation so as to increase medical tourism.

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3. Demand For Number of patients

- Average occupancy ratio for private hospitals is 60-70%. With bed strength of 200 beds, the average number of out-patients visiting the hospital/day is about 225, and the number of in-patients admitted/day is 120.

- With bed strength of 100 beds, the average number of out-patients visiting the hospital/day is about 111, and the number of in-patients admitted/day is 60.

- Occupancy ratio of 45-50% is good enough to break even. So there is a demand to increase the occupancy ratio which will increase the number of out-patients and in-patients visiting the hospital/day.

Supply Scenario

HOSPACCX
INDIA SYSTEMS

1. Medical Infrastructure

DOCTORS

- 4,000
- 0.8/1000 POPULATION

NURSES

- 5,300
- 1.06/1000 POPULATION

PHYSICIANS

- 2,500
- 0.5/1000 POPULATION

BEDS

- 5,500
- 1.07/1000 POPULATION

Supply Scenario

HOSPACCX
INDIA SYSTEMS

2. Hospitals based on Ownership

- There are approximately 360 hospitals within the city and the total number of beds in the city is 5,500 to 6,500 beds.

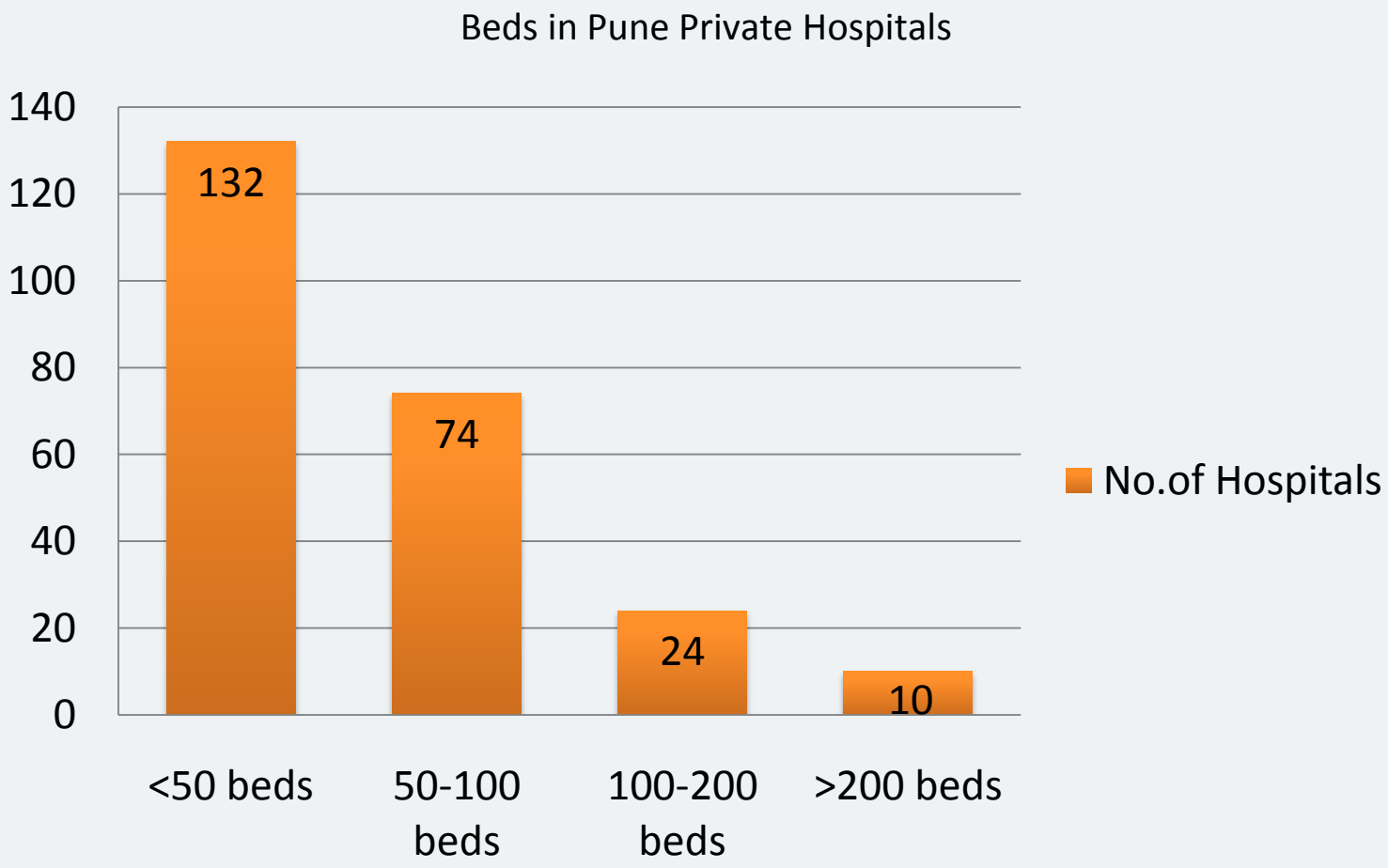
- Pune has approximately 240 private hospitals. Some of the private Hospitals include –

  1. Ruby Hall Clinic
  2. Jehangir Hospital
  3. Sahyadri Hospital
  4. Sancheti Hospital

Supply Scenario

HOSPACCX
INDIA SYSTEMS

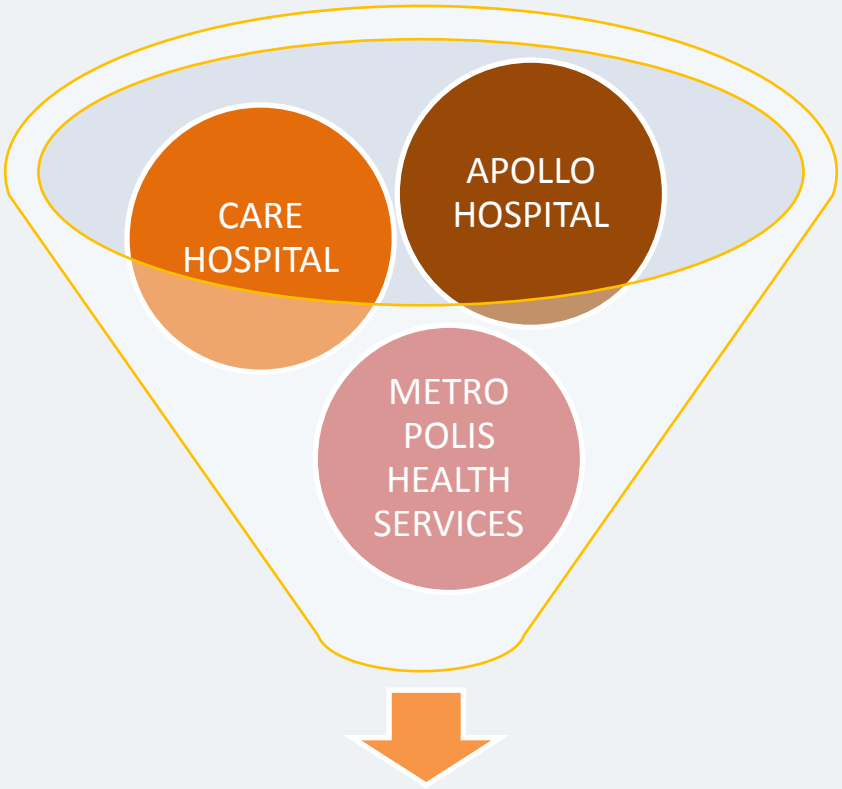
3. Private Hospitals based on bed capacity



Supply Scenario

HOSPACCX
INDIA SYSTEMS

4. Hospital chains

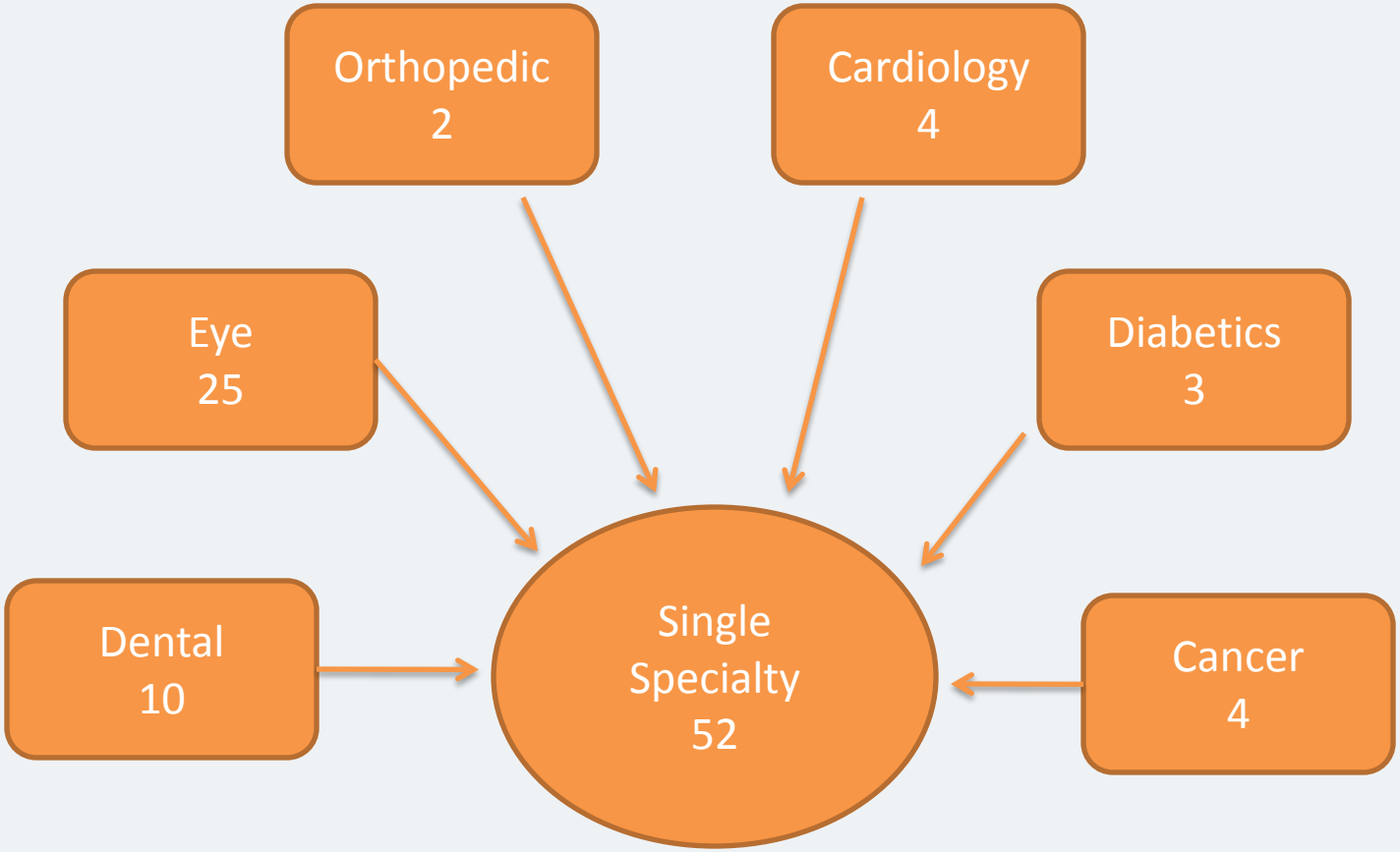


EXSTING HOSPITAL CHAINS

Supply Scenario

HOSPACCX
INDIA SYSTEMS

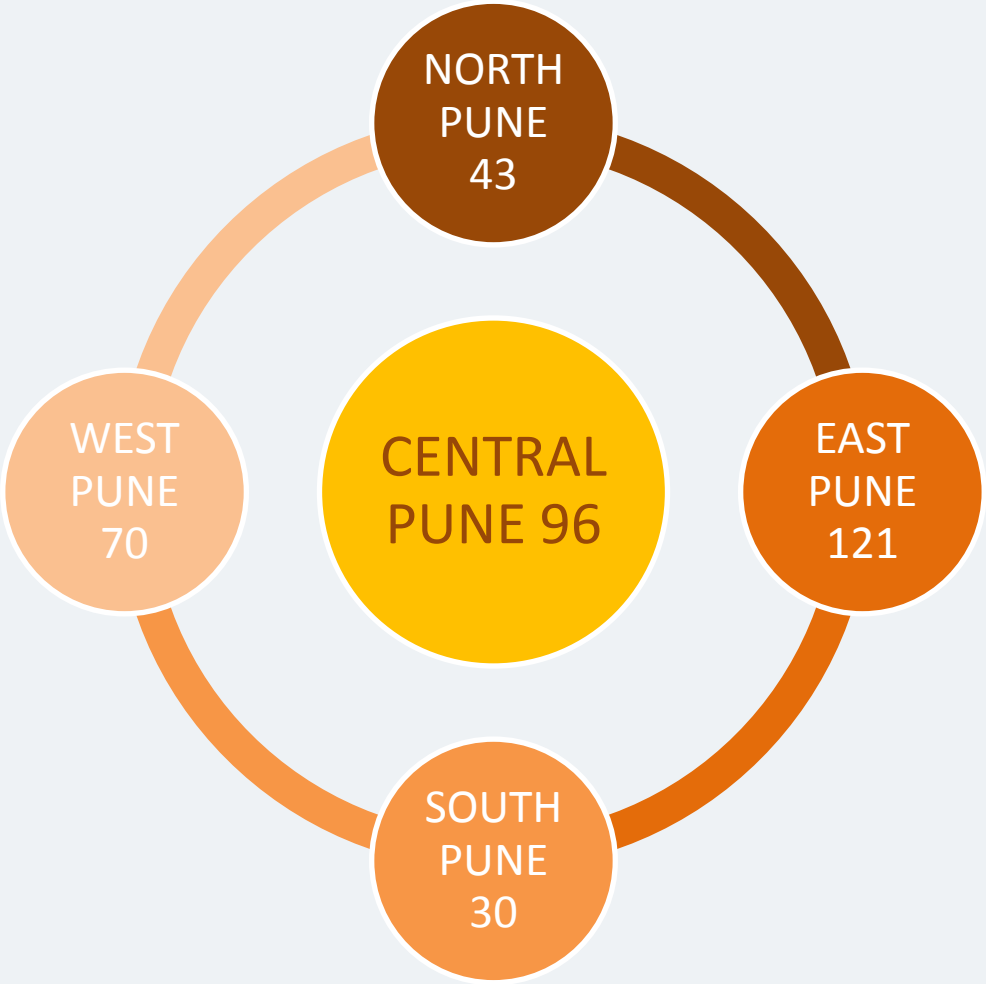
5. Private Hospitals based on specialty (Contd…)



Supply Scenario

HOSPACCX
INDIA SYSTEMS

6. Hospitals based on location



Supply Scenario

HOSPACCX
INDIA SYSTEMS

7. Hospitals empanelled by Insurance companies and Third Party Administrators (TPA)

- There are more than 120 hospitals empanelled by various Insurance Companies and Third Party Administrators (TPA) of which approximately

HOSPACCX
INDIA SYSTEMS

CATCHMENT AREA IDENTIFICATION

Contd...

HOSPACCX
INDIA SYSTEMS

PARTICULARS	CATCHMENT AREAS	DISTANCE FROM HOSPITAL LOCATION (km)
Principal Area (0-25 km) 100% Population	Pimpri Chinchwad	7.4
	Akurdi	8.6
	Dehu	14.9
	Nigdi	10.7
	Aundh	13.6
	Pune City	16.9
	Baner	18.4
	Chakan	16.6
	Hinijewadi	16.6
	Lohegaon	19.8
Subordinate Area (25-50km)	Vadgaon	35
	Koregaon	36.5
Peripheral Area (>50km) 25% Population	Narayangaon	60.8
	Ranjangaon	61.1
	Lonavala	55.1

Reasons for Drainage

HOSPACCX
INDIA SYSTEMS

AREA	REASONS FOR DRAINAGE
PRINCIPAL (100%)	
Pimpri Chinchwad	•Widening-choice, •quality-seeking and word-of-mouth-influence
Akurdi	
Dehu	
Nigdi	
Aundh	
Pune City	
Baner	
Chakan	
Hinijewadi	
Lohegaon	
SUBORDINATE (50%)	
Vadgaon	•Patients looking for specialized services.
Koregaon	
PERIPHERAL (25%)	
Narayangaon	•All specialized tertiary care services under one roof
Ranjangaon	
Lonavala	

HOSPACCX
INDIA SYSTEMS

HOSPITALS SURVEYED

Hospital to be Surveyed

HOSPACCX
INDIA SYSTEMS

1. Ruby Hall Clinic - 550
2. Aditya Birla Memorial Hospital - 500
3. Jehangir Hospital - 350
4. Sahyadri Hospital - 180
5. Sancheti Hospital - 150
6. Nirmaya Hospital - 110
7. Oyster & Pearl Hospital - 100
8. Lokmanya Hospital - 150 (100 Operational)

Ruby Hall Clinic

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INDIA SYSTEMS

- Started as a small Nursing home in 1959 by Dr. K.B Grant.
- Multispecialty tertiary care hospital
- CEO: Mr. Bomi Bhote
- OPD per day:
- Bed strength: 550
- No. of ICU beds: 130 dedicated in various specialties
- Accreditations: NABH & NABL.
- Pune's First & only Accredited Hospital
- National Award for Best Medical Tourism in 2012

Aditya Birla Memorial Hospital

HOSPACCX
INDIA SYSTEMS

- Established in 1995
- Multispecialty Charitable trust Hospital
- Director: Mr Bihari Lal Shah
- Bed strength: 500
- Area: 16 acres
- No. of ICU beds: 32
- No. of OT'S: 13
- OPD per day:
- Medical Tourism: Tratement for International patients.

Jehangir Hospital

HOSPACCX
INDIA SYSTEMS

- Established in 1946
- Multispecialty Hospital
- Bed strength: 350
- No. of ICU beds : 48
- Accreditation: ISO:9001:2000 Certified
- Specialties in:
  - ✓ Advanced Heart Care
  - ✓ Orthopedics
  - ✓ Spine Surgery
  - ✓ Gastroenterology
  - ✓ Neurosciences
  - ✓ Cancer care

Sahyadri Hospital

HOSPACCX
INDIA SYSTEMS

- Multispecialty tertiary care Hospital
- Promoter: Sahyadri Hospital Group
- Bed strength: 180
- Accreditations: NABH & ISO 9001:2000 Certified
- OPD per day
- Sahayadri Medical Genetics: A unique Comprehensive Facility offering Clinical, Diagnostic & Therapeutic services in Genetic
- Performing highest number of CT angiographies in Asia
- Highest number of MRIs in Pune
- Highest number of Neurosurgeries in Pune
- Highest number of Bone Marrow Transplants in Western India

Sacheti Hospital

HOSPACCX
INDIA SYSTEMS

- Super Speciality Orthopaedic Hospital
- Promoter: Dr K.H Sancheti
- Area: 1,50,000 sq. ft
- Bed Strength: 200
- Largest private Orthipaedic super speciality facility in South East Asia
- OPD per day
- Speciality includes:
  - ✓ Joint Replacement
  - ✓ Traumatology
  - ✓ Spinal Surgery
  - ✓ Pediatrics
  - ✓ Orthopaedics
  - ✓ Arthroscopy
  - ✓ Sports Injuries
  - ✓ Hand and Plastic Surgery

Nirmaya Hospital

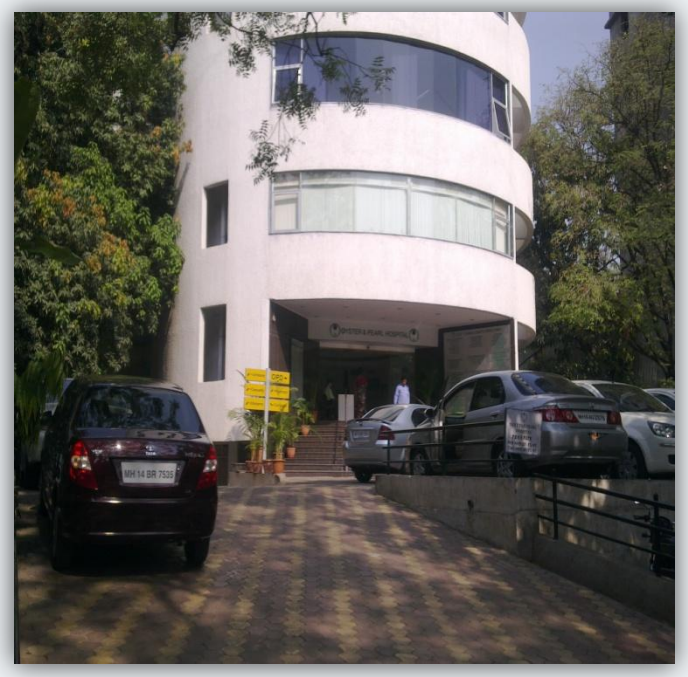
HOSPACCX
INDIA SYSTEMS

- Established in 26th August 2000.
- Multispeciality, hospital
- Bed Strength: 110
- OPD per day:
- Built-up area: 32000sq ft
- Speciality available:
  - ✓ General Medicine
  - ✓ General Surgery
  - ✓ Obstrectics &Gynaecology
  - ✓ Orthpaedics & Joint Replacements
  - ✓ NT
  - ✓ Paediatrics / Neonatology
  - ✓ Psychiatry
  - ✓ Physiotherapy
  - ✓ Homeopathy

Oyster and pearl Hospital

HOSPACCX
INDIA SYSTEMS

- Established in september 2008
- Multispeciality, hospital
- Bed Strength:110
- OPD per day: 300
- Also Caters to international patients
- Woman healthcare & Child healthcare services are one of the best
- Speciality available:
  - ✓ Obstrectics &Gynaecology
  - ✓ Paediatrics / Neonatology
  - ✓ Infertility
  - ✓ ENT
  - ✓ Opthalmology
  - ✓ Internal Medicine



Lokmanya Heart Hospital, Chinchwad

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INDIA SYSTEMS

- Established in 1974
- Charitable Trust Hospital
- Superspeciality Heart institute
- Bed Strength:150
- OPD per day

Key Business Drivers in Pune

HOSPACCX
INDIA SYSTEMS

RUBY HALL CLINIC

JEHANGIR HOSPITAL

Key Business Drivers in Pune

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ADITYA BIRLA MEMORIAL HOSPITAL

SANCHETI HOSPITAL

HOSPACCX
INDIA SYSTEMS

HOSPITALS AT GLANCE

Hospital at Glance

HOSPACCX
INDIA SYSTEMS

DEPARTMENT	ADITYA BIRLA MEMORIAL HOSPITAL	SAHYADRI HOSPITAL	JEHANGIR HOSPITAL	RUBY HALL CLINIC	DEENANATH MANGESHKAR HOSPITAL & RESEARCH CENTRE	OYSTER & PEARL HOSPITAL	LOKMANYA HOSPITAL	SANCHETI HOSPITAL	NIRMAYA HOSPITAL
TOTAL NO. OF BEDS	500	150	300	550	450	100	150	150	110
BED DISTRIBUTION									
TOTAL NO. OF Operational BEDS	200	150	300	550	450	100	100	150	110
GENERAL BEDS	95	75	90	150	120	45	40	50	45
Delux Room	13	10	25	60	45	5	6	15	10
Twin sharing Rooms	50	15	30	65	55	10	8	18	10
Private rooms	10	10	7	30	55	5	11	4	7
ICU BEDS	32	25	48	130	120	25	27	45	28
OT									
MAJOR OT	12	4	10	15	13	5	4	6	4
MINOR OT	1	1	1	1	1	1	1	1	1
LABOUR ROOM	Y	Y	Y	Y	Y	Y	Y	Y	Y
Average OPD per day	300	323	366	1650	1461	200	250	350	200
Occupancy rate	70%	90%	68%	85%	80%	85%	90%	80%	80%

Source: *Census 2011*

Global Hospital, Pune

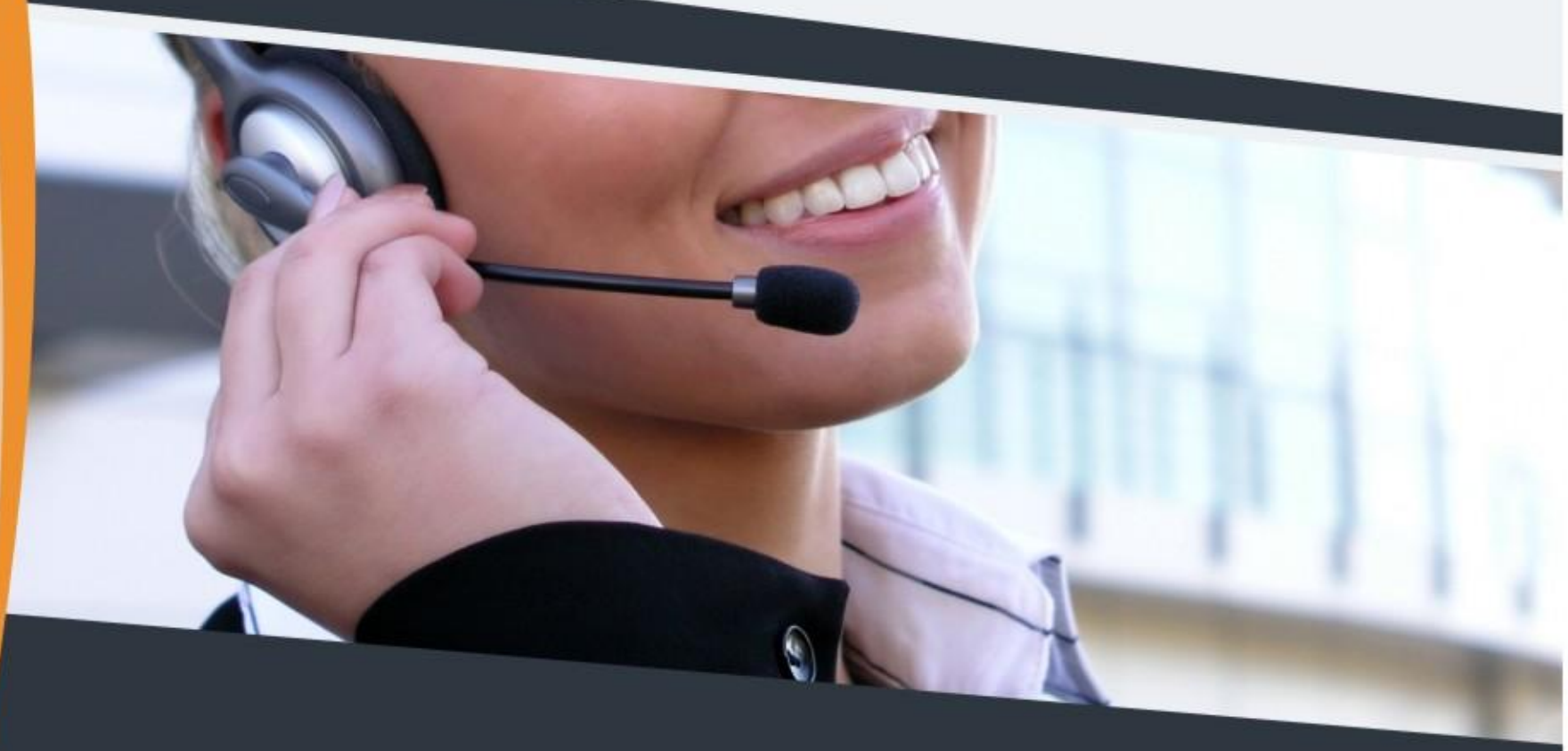
HOSPACCX
INDIA SYSTEMS

Contd...

HOSPACCX
INDIA SYSTEMS

- The Project is situated in the heart of Bhosari region Which is the important part of Pimpari
- Chinchwad area.
- The area is densely populated with residential population and PCMC area is famous for Industrial zone.
- The Hospital is located near to Pune - Mumbai Express highway and Pune - Nashik highway. The total constructed area of the Hospital is 10,043.75 Sq.mt.
- The construction work of Hospital is completed. Hospital is constructed according to the Hospital accreditation norms.
- The hospital is having 4 big size Operation theater. With 13 consulting rooms for clinical services which requires for Multispecialty Hospital.
- Other than clinical services the Hospital has the separate commercial floor which can be use for Bank , Restaurant , Medical Shop.
- In basement there is separate space for Auditorium with 100 people sitting capacity.
- There is ample space is available for parking.
- The total constructed area is approximately 10,043.75 Sq.mt.
- The each floor plate is around 1250 Sq.mt.
- The total 4 floors are in the building excluding basement , parking and commercial floor.
- The Construction work for the project is completed .
- The hospital is design as per the accreditation norms and the hospital has spacious consulting ,patients rooms .

HOSPACCX
INDIA SYSTEMS



SERVICE MIX
FACILITY MIX

Service Mix of Hospitals

HOSPACCX
INDIA SYSTEMS

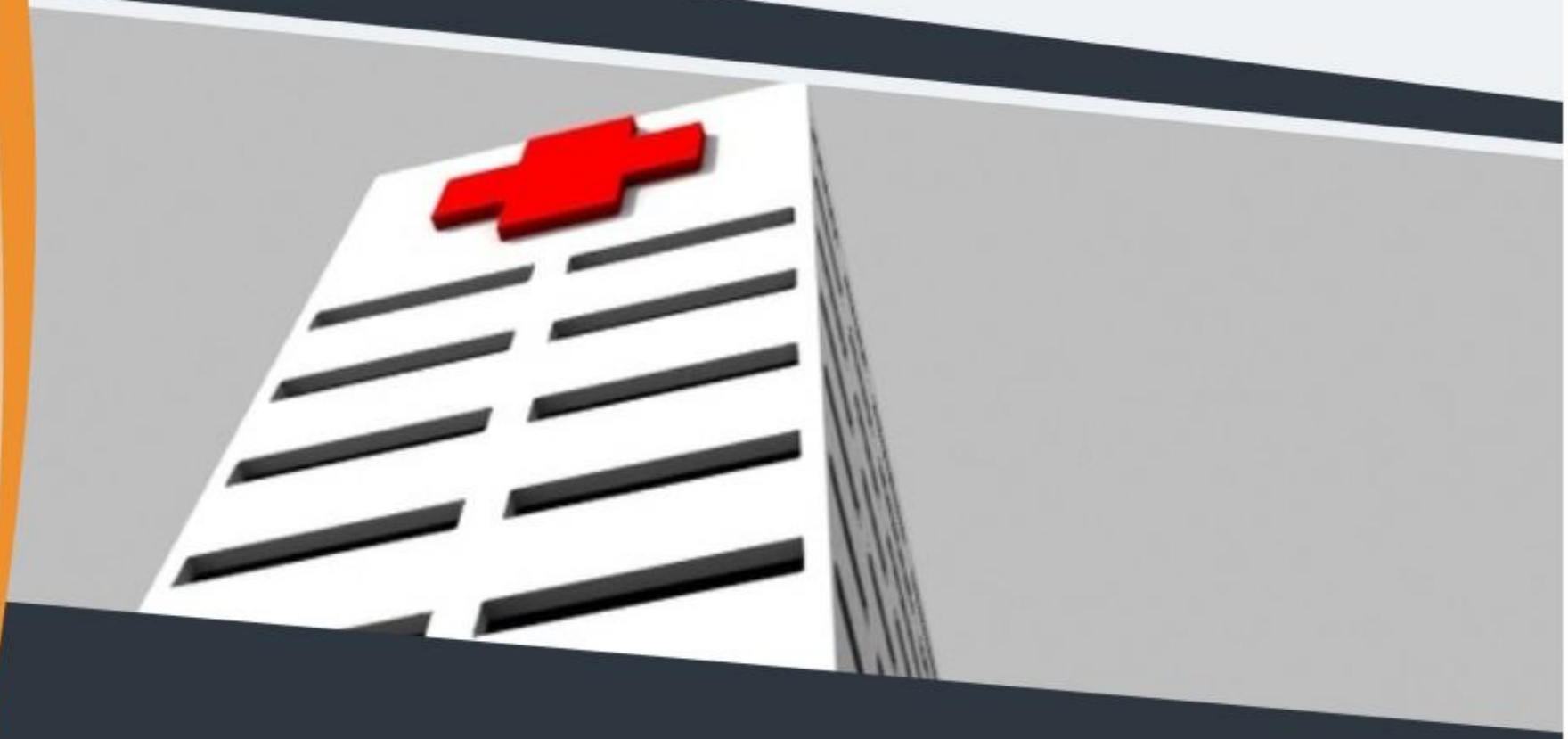
DEPARTMENT	ADITYA BIRLA MEMORIAL HOSPITAL	SAHYADRI HOSPITAL	JEHANGIR HOSPITAL	RUBY HALL CLINIC	DEENANATH MANGESHKAR HOSPITAL & RESEARCH CENTRE	OYSTER & PEARL HOSPITAL	LOKMANYA HOSPITAL	SANCHETI HOSPITAL	NIRMAYA HOSPITAL
Ortho. OPD	√	√	√	√	√	√	√	√	√
Ortho surg	√	√	√	√	√	√	√	√	√
Neurology	√	√	√	√	√	√	√	√	×
Neuro. surg	√	√	√	√	√	√	√	×	×
OBGY OPD	√	×	×	√	√	√	√	×	√
OBGY surg	√	×	×	√	√	√	√	×	√
Cardiology	√	√	√	√	√	×	√	×	×
Cardiac surg.	√	√	√	√	√	×	√	×	×
Onco	√	√	√	√	√	×	√	√ (Orthopaedic)	×
Ophthal	√	√	×	√	√	√	√	×	√
General surgeries	√	√	√	√	√	√	√	×	√
Organ transplant	√	√	√	√	–	×	√	×	×
Gastroentero	√	×	√	√	√	√	√	×	×
Plastic surgery	√	√	×	√	√	√	√	√	×
Dental & maxillary surgery	×	×	×	√	×	×	×	√	×
Paeds & neonatal	√	×	×	√	√	√	√	√ (Pediatric Orthopaedic)	√

Facility Mix of Hospitals

HOSPACCX
INDIA SYSTEMS

DEPARTMENT	ADITYA BIRLA MEMORIAL HOSPITAL	SAHYADRI HOSPITAL	JEHANGIR HOSPITAL	RUBY HALL CLINIC	DEENANATH MANGESHKAR HOSPITAL & RESEARCH CENTRE	OYSTER & PEARL HOSPITAL	LOKMANYA HOSPITAL	SANCHETI HOSPITAL	NIRMAYA HOSPITAL
X Ray	√	√	√	√	√	√	√	√	√
CT	√	√	√	√	√	×	√	√	√
MRI	√	√	×	√	√	×	√	√	×
Sonography	√	√	√	√	√	×	√	√	√
Pathology Services	√	√	√	√	√	√	√	√	√
ECG & TMT	√	√	√	√	√	×	√	√ (ECG)	√
Echo	√	√	√	√	√	×	√	√	√
Cath Lab.	√	√	√	√	√	×	√	×	√
Blood Bank	√	√	√	√	√	×	√	×	×
Doppler	√	√	√	√	√	×	√	√	√

HOSPACCX
INDIA SYSTEMS



TARIFF OF HOSPITALS SURVEYED

HOSPACCX
INDIA SYSTEMS

CHARGES IN (INR)	ADITYA BIRLA MEMORIAL HOSPITAL	SAHYADRI HOSPITAL	JEHANGIR HOSPITAL	RUBY HALL CLINIC	DEENANATH MANGESHKAR HOSPITAL & RESEARCH CENTRE	OYSTER & PEARL HOSPITAL	LOKMANYA HOSPITAL	SANCHETI HOSPITAL	NIRMAYA HOSPITAL
OPD charges 1st time	300	300	200-500	150-300	200	250	200-300	250	200
OPD charges Follow up	200	150	100	100-150	100	150	100	150	100
ICU	2200	5000	3000	2200	1020	2100	2000	2500	1800-2000
General	650	750	500	250-750	200	500	450	450	400
Deluxe	2700	2000-2800	2000-3200	1800-2000	500-950	2500	2300	2000-2500	2200
Super Deluxe	4600	3500	5500-11000	2500-7500	1350 - 6000	5000	4500-5500	4500-55000	3500-4000
X-Ray	200	200	150	250	160	170	150	150	150
USG(whole abdomen)	1500	-	2000	-	-	2000		1500-2500	-
E.C.G.	100	220	125	125	125	125	150	125	100
CBC	100	120	100	200	90	100	90	90	90
C.T.	3500	2700	3500	3500	-	3000	3500	3500	3000
M.R.I	4500	5000	4000-12000	4500	4000	-	-	5500	-
Serum cholestrol	200	180	100	200	90	150	180	180	180
HIV	300		300	350	250	300	300	-	250
Blood Sugar	100	100	100	100	105	100	100	-	90
Stress test	1200	1000	1245-3980	750	700	1000	1200	-	850
ECHO	750	900	840-2690	700	1250	-	850	--	

Surgery Cost

HOSPACCX
INDIA SYSTEMS

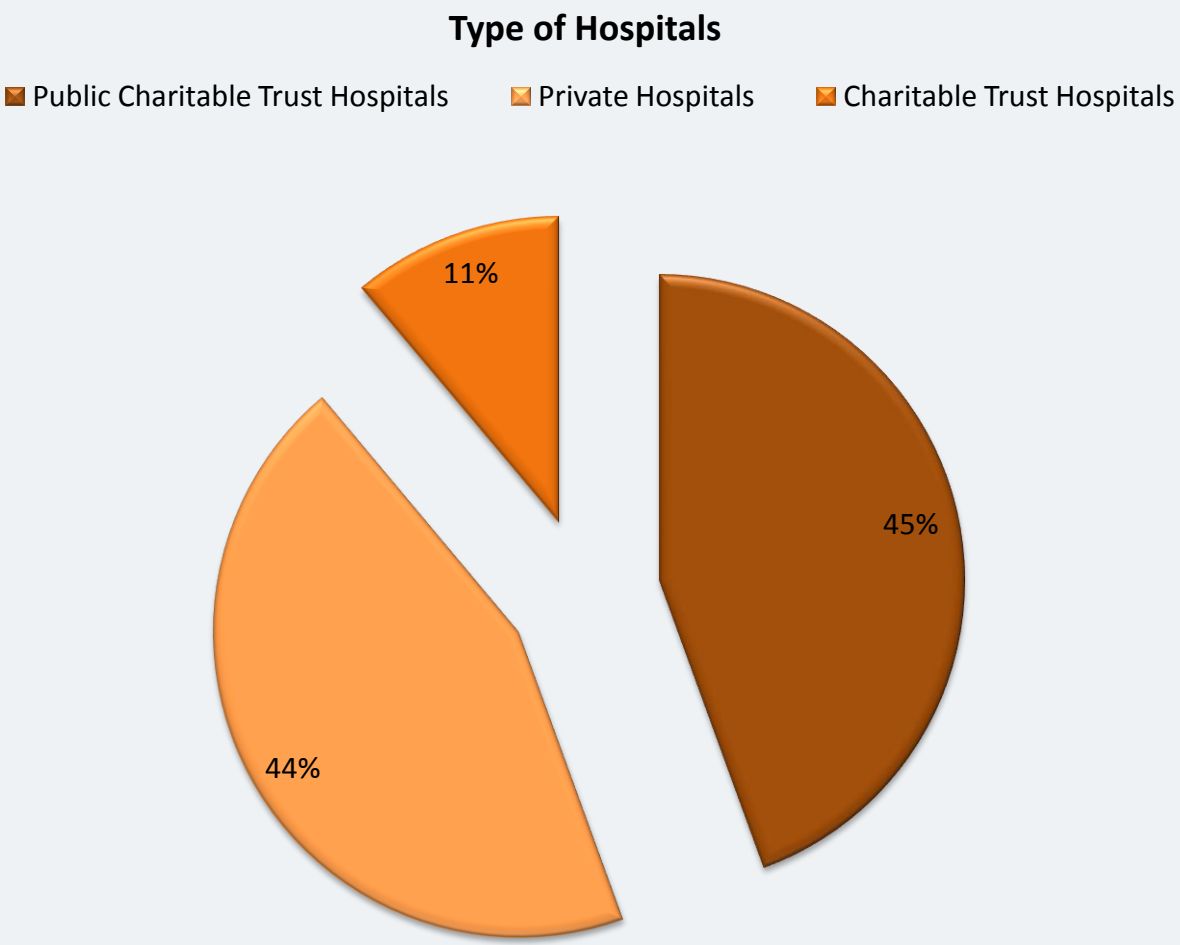
CHARGES IN (INR)	ADITYA BIRLA MEMORIAL HOSPITAL	SAHYADRI HOSPITAL	JEHANGIR HOSPITAL	RUBY HALL CLINIC	DEENANATH MANGESHKAR HOSPITAL & RESEARCH CENTRE	OYSTER & PEARL HOSPITAL	LOKMANYA HOSPITAL	SANCHETI HOSPITAL	NIRMAYA HOSPITAL
Appendicectomy	9000	8500	10000	12000	12000	10000	10000	10,000	11000
Cataract	×	×	×	20,000	×	×	15,000	×	×
LSCS	20,000	17000	X	20,000-25,000	22000	15,000	15000	x	16000
Hip replacement	1.75 L	×	1.75-2.5L	1.75-2.0L	×	×	×	1.75-2.5L	×
Knee replacement	1.5L	×	1.5-2.0L	×	×	×	×	1.5-2.5L	×
Angioplasty	1,00,000-1,50,000	90,000-2,00,000	1,50,000	1,20,000-2,50,000	1,05,000-1,80,000	×	90,000-1,50,000	×	×
Angiography	9000	10,500	9,600	10,000-27,000	9000	×	10,000	×	×
Hysterectomy	10000	12000	10000	10000	10000	10000	10000	10000	13000

HOSPACCX
INDIA SYSTEMS

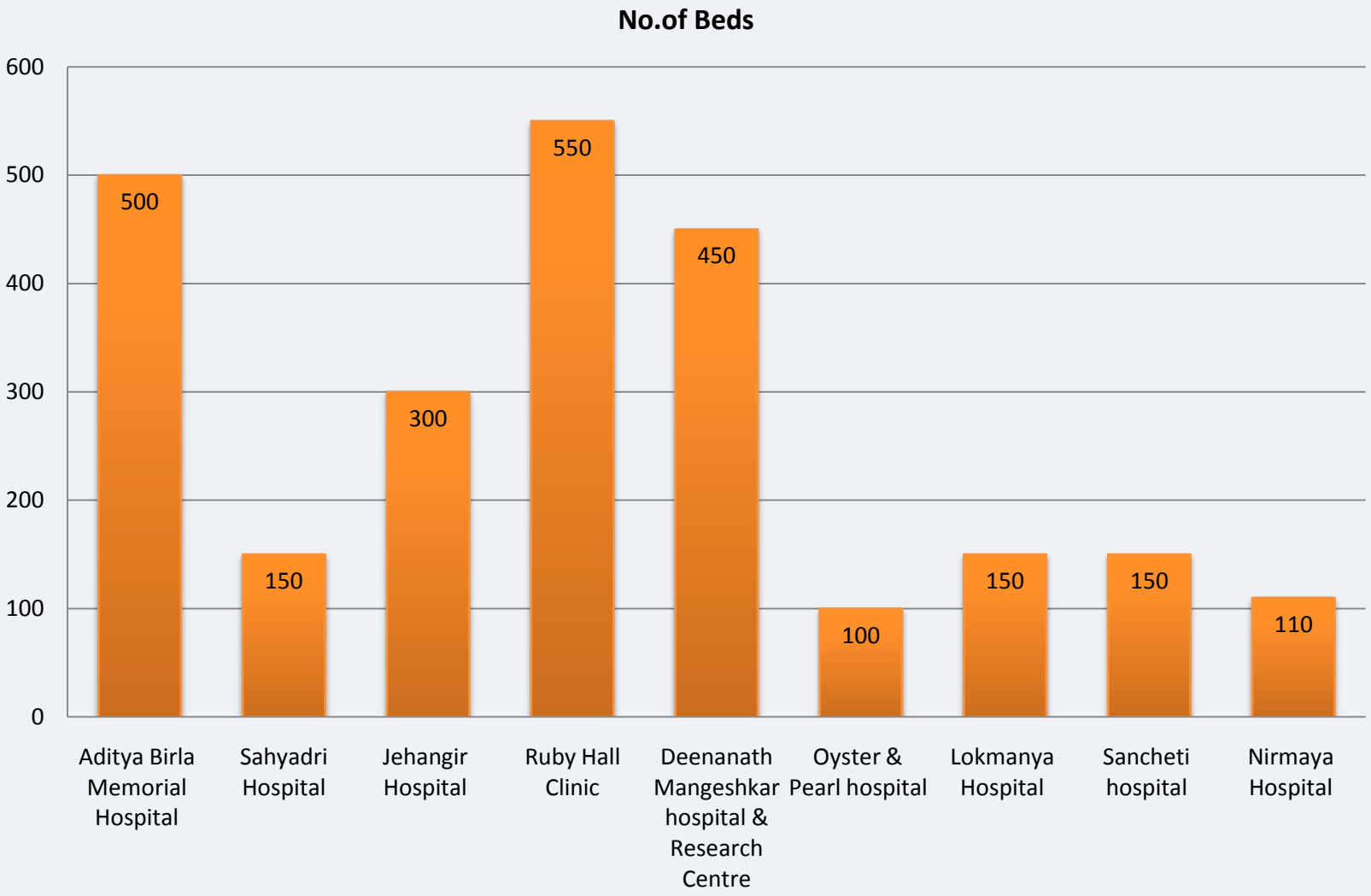
PRIMARY DATA ANALYSIS

Types of Hospitals

HOSPACCX
INDIA SYSTEMS



Number of Beds



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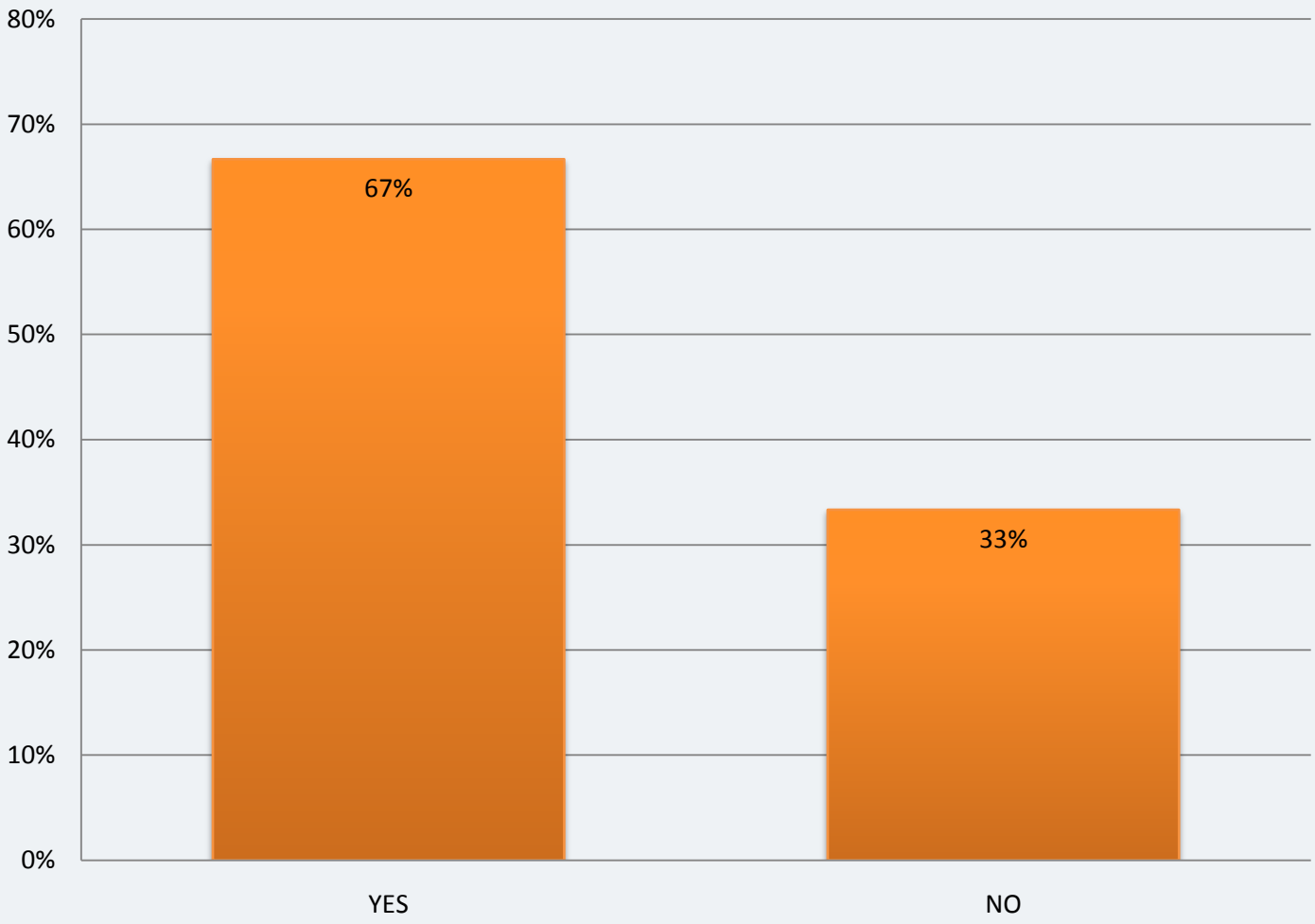
INDIA SYSTEMS

OPDs Open Every Day Except Sunday



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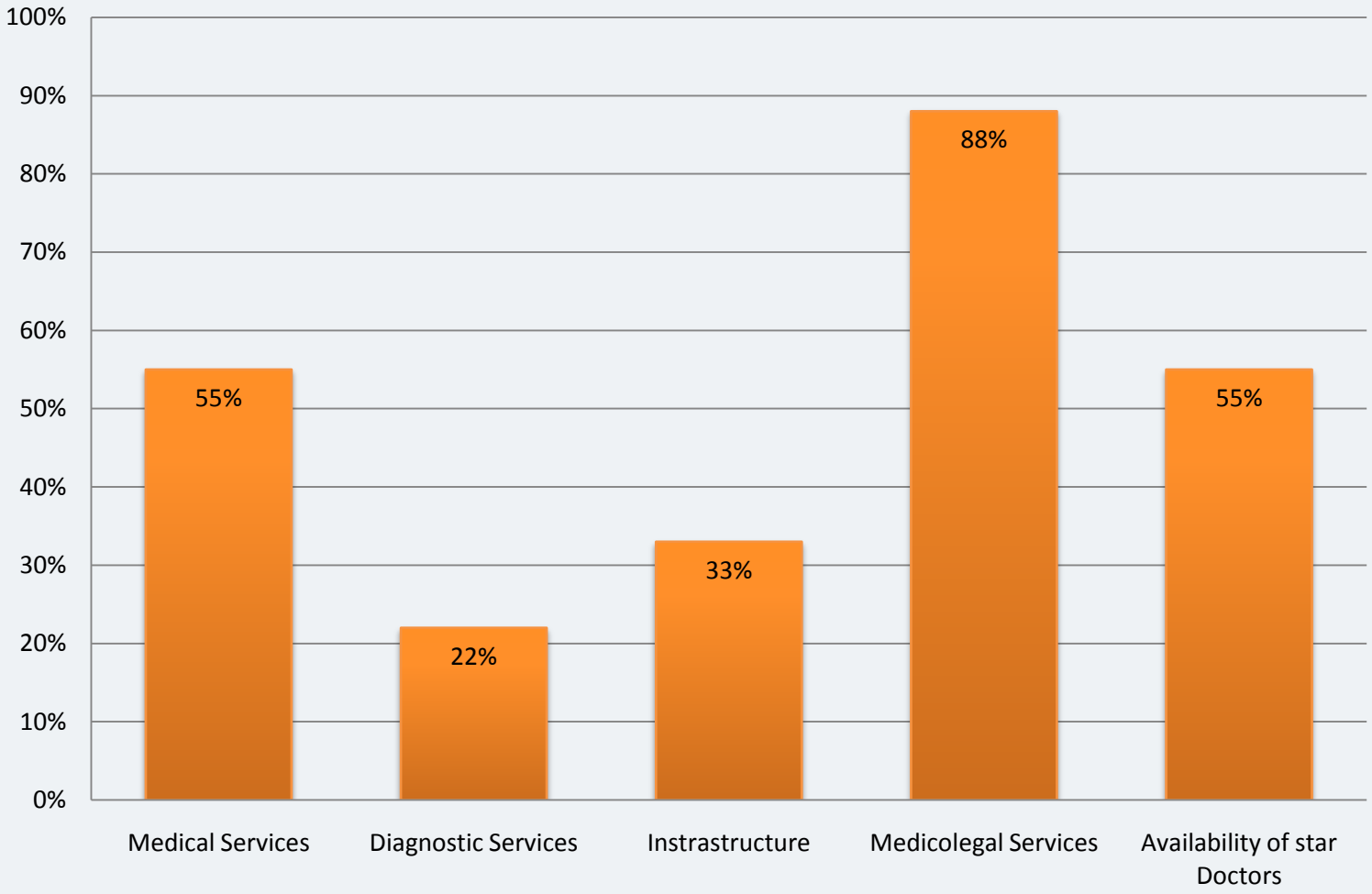
INDIA SYSTEMS

Reasons for Reference to Other Hospitals



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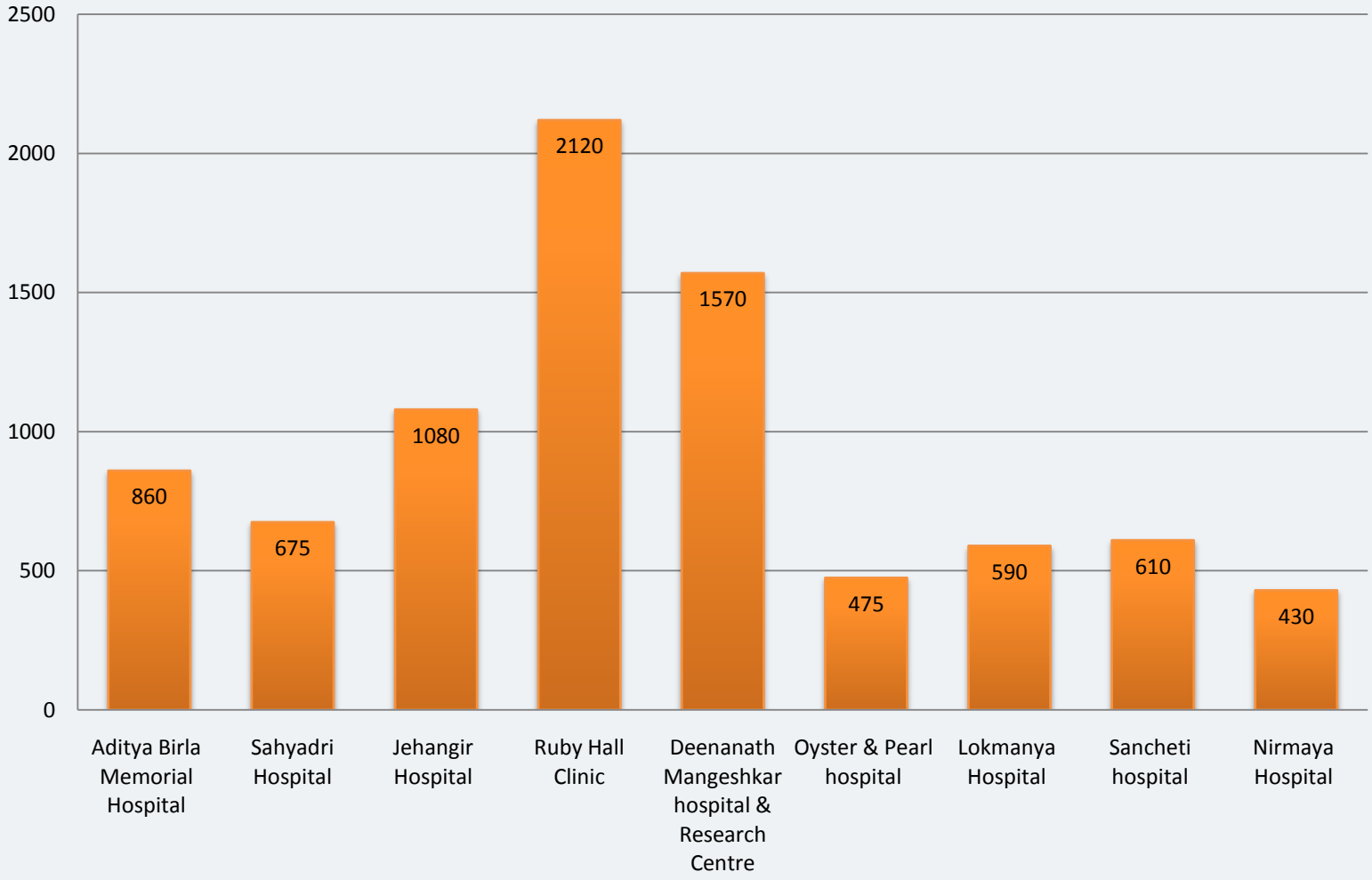
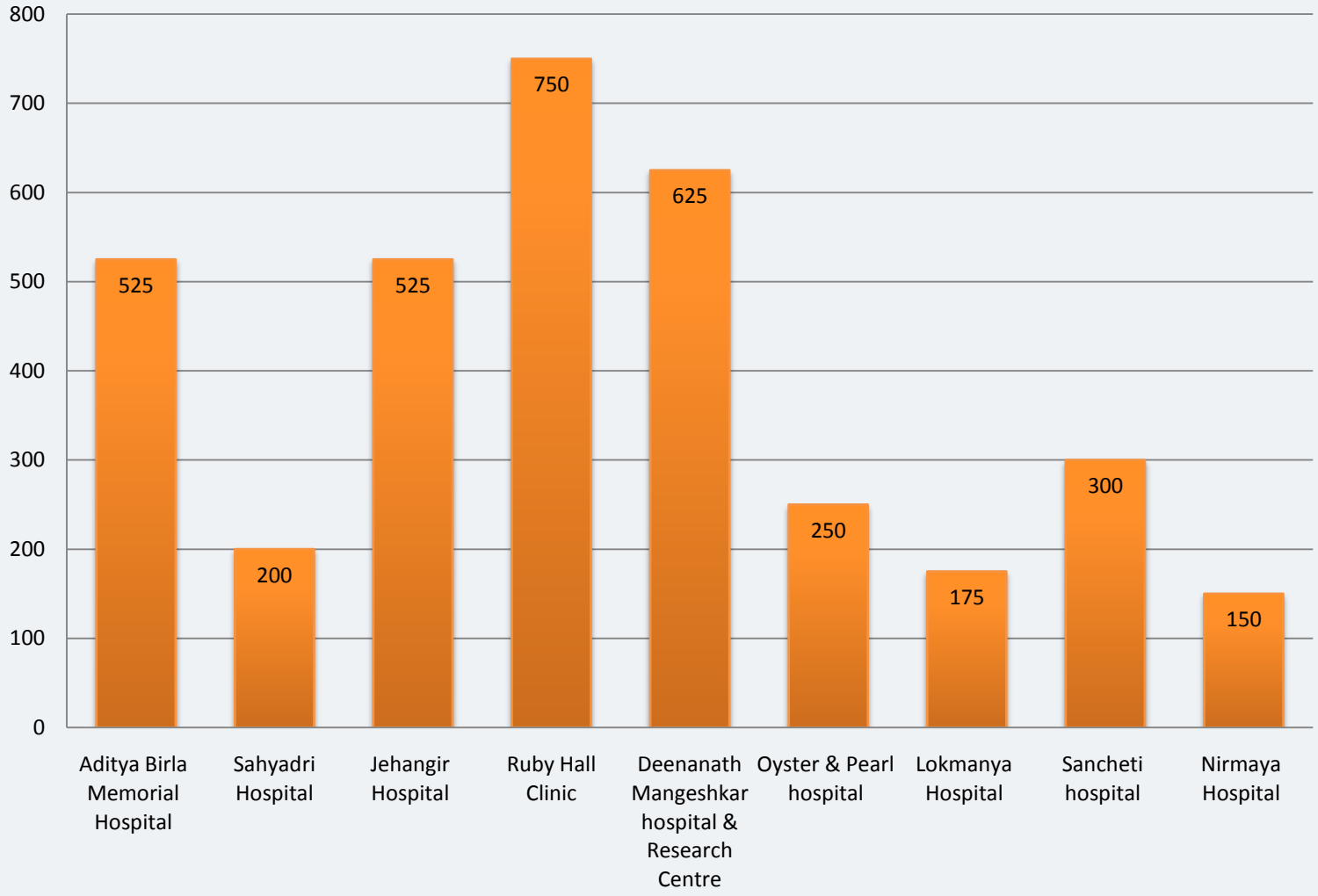
INDIA SYSTEMS

Total Manpower of Hospitals



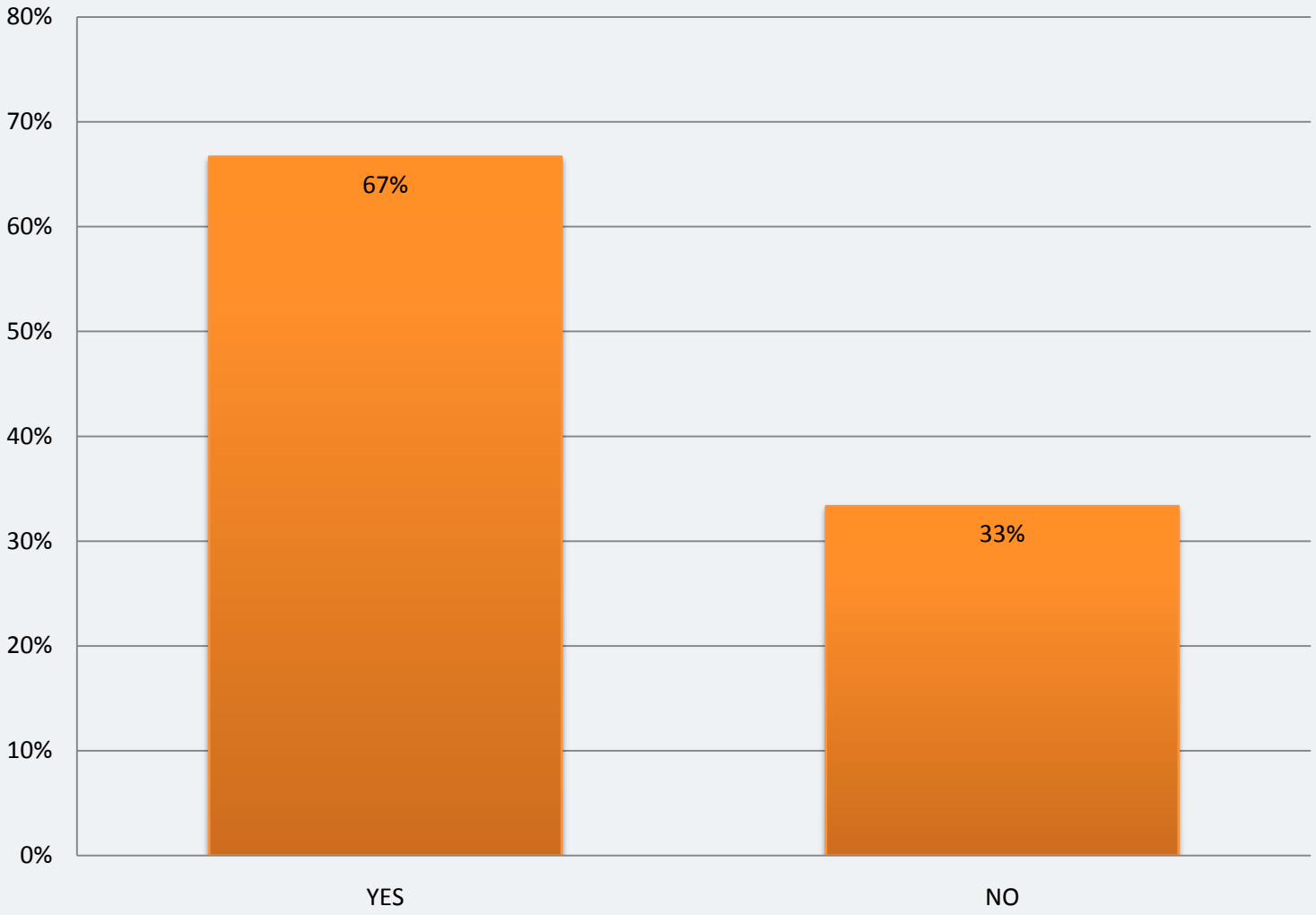
HOSPACCX
INDIA SYSTEMS

Total No. of Surgeries per Month



HOSPACCX
INDIA SYSTEMS

Patients Willingness to Pay for Quality Service



Extra Facilities

HOSPACCX
INDIA SYSTEMS

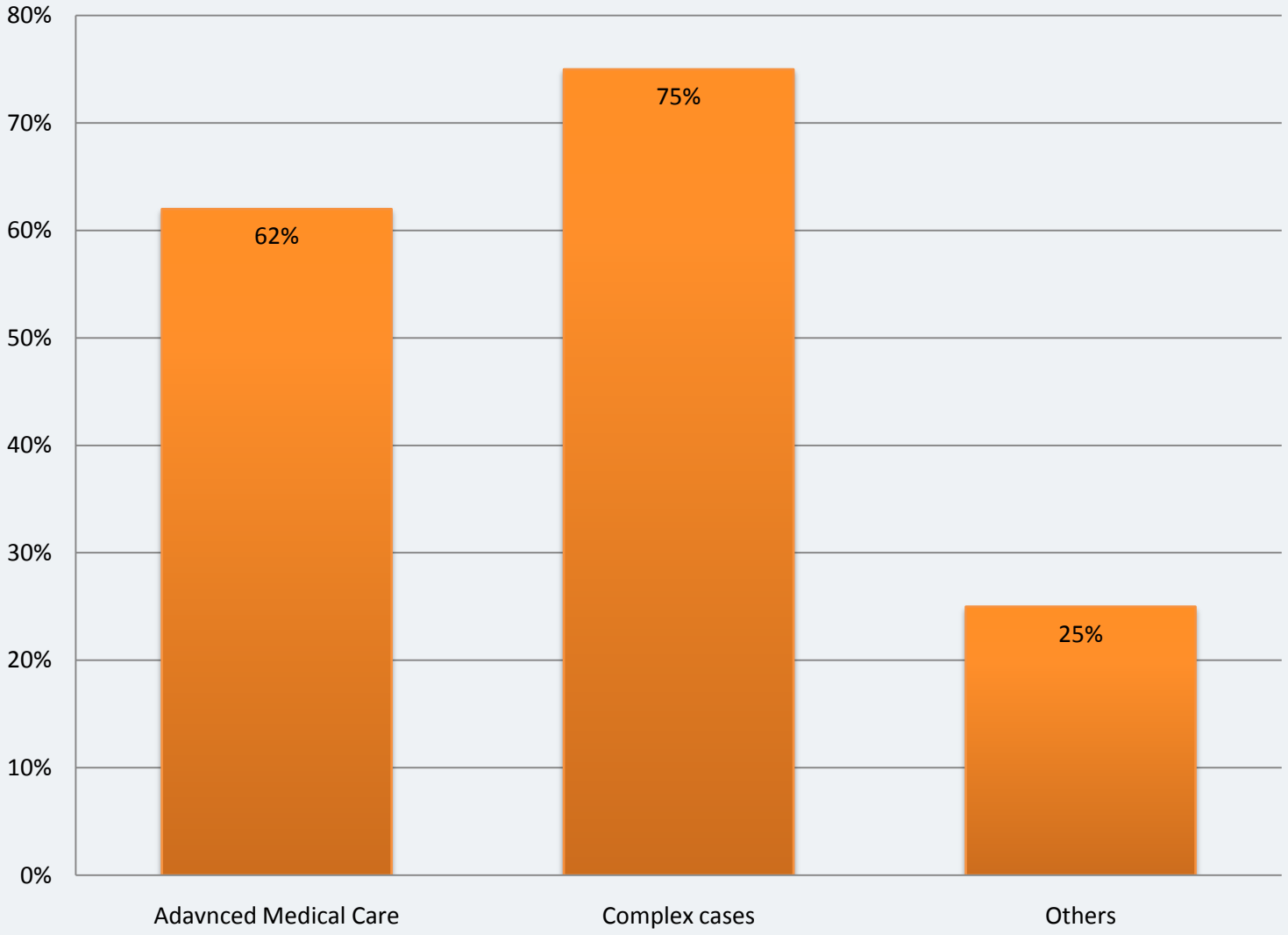
FACILITIES	
Cafeteria	100%
Pharmacy	100%
ATM Centre	77%
Nursing College	45%
Cafeteria	100%

HOSPACCX
INDIA SYSTEMS

DOCTOR SURVEY

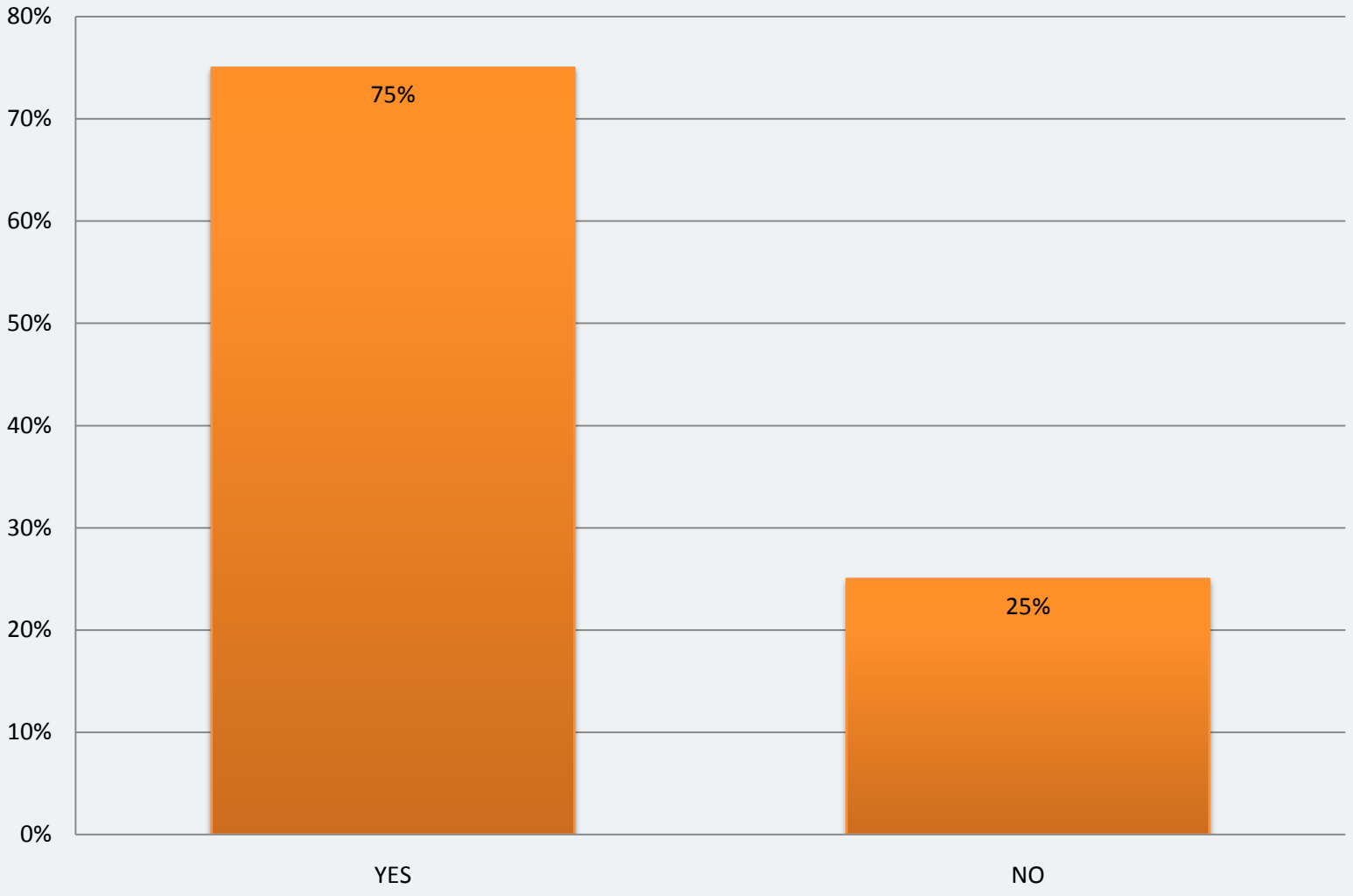
HOSPACCX
INDIA SYSTEMS

Reasons for Referral by Doctors



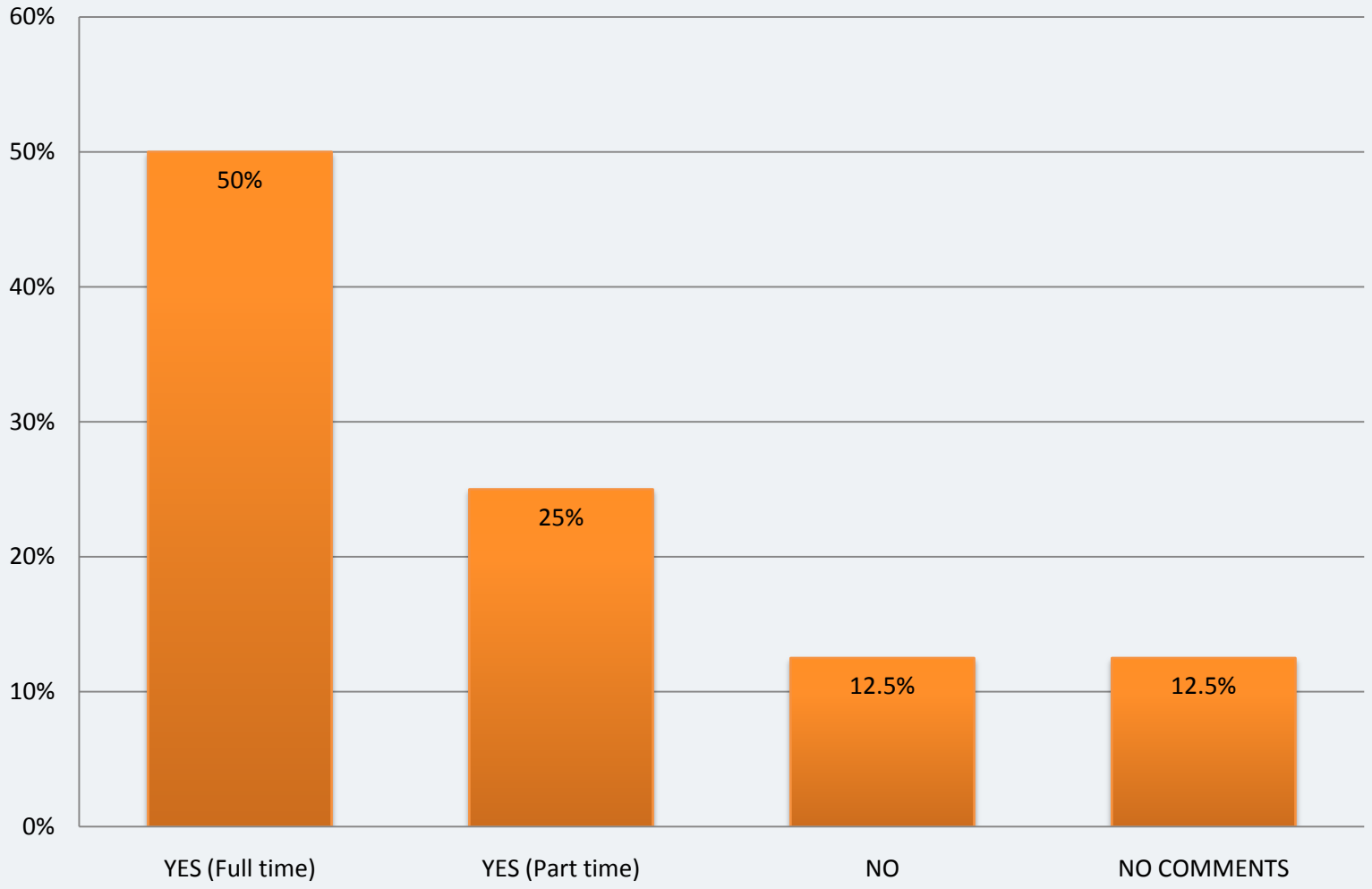
HOSPACCX
INDIA SYSTEMS

Need for New Hospital



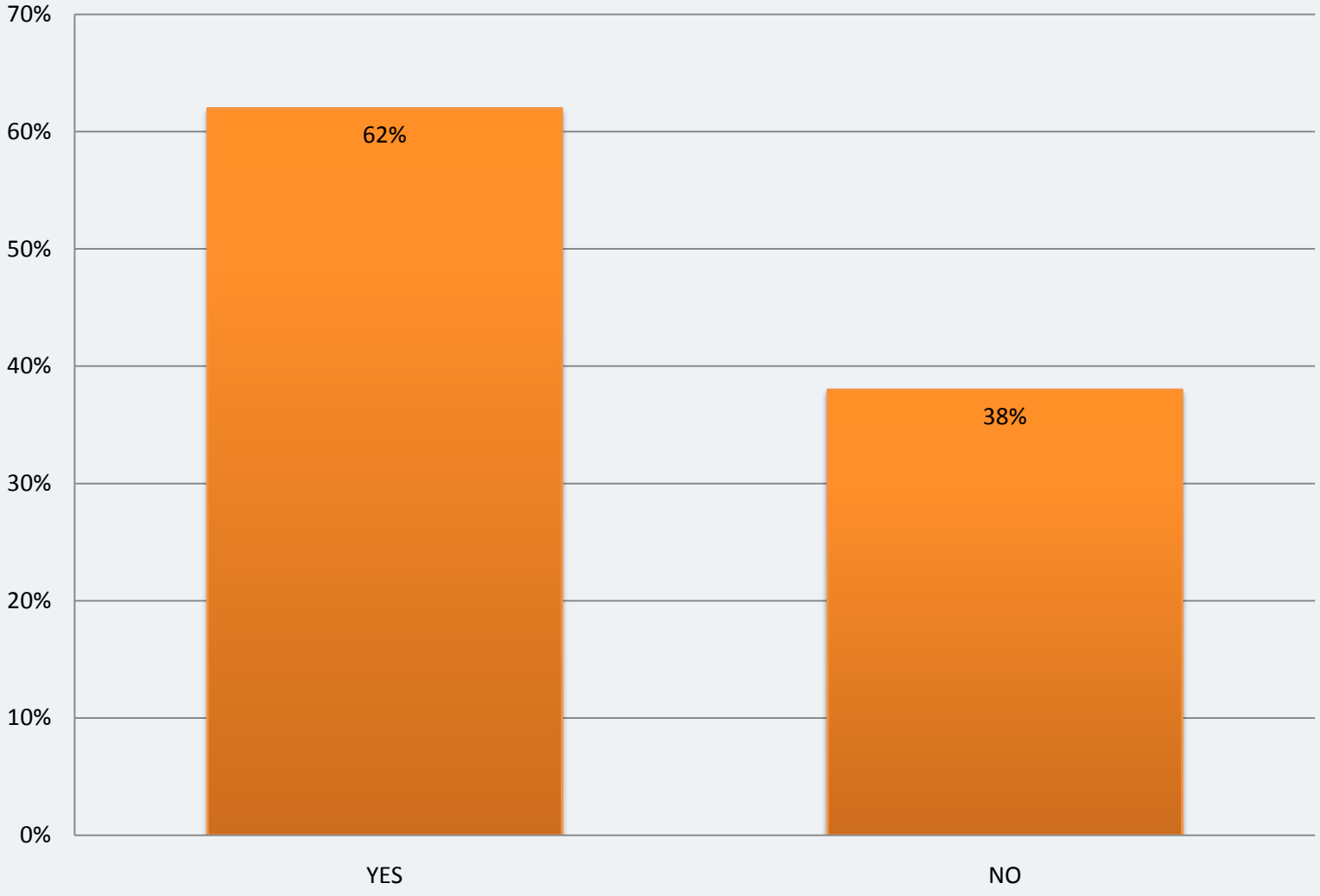
HOSPACCX
INDIA SYSTEMS

Interest for New Hospital



HOSPACCX
INDIA SYSTEMS

Shortage of Manpower

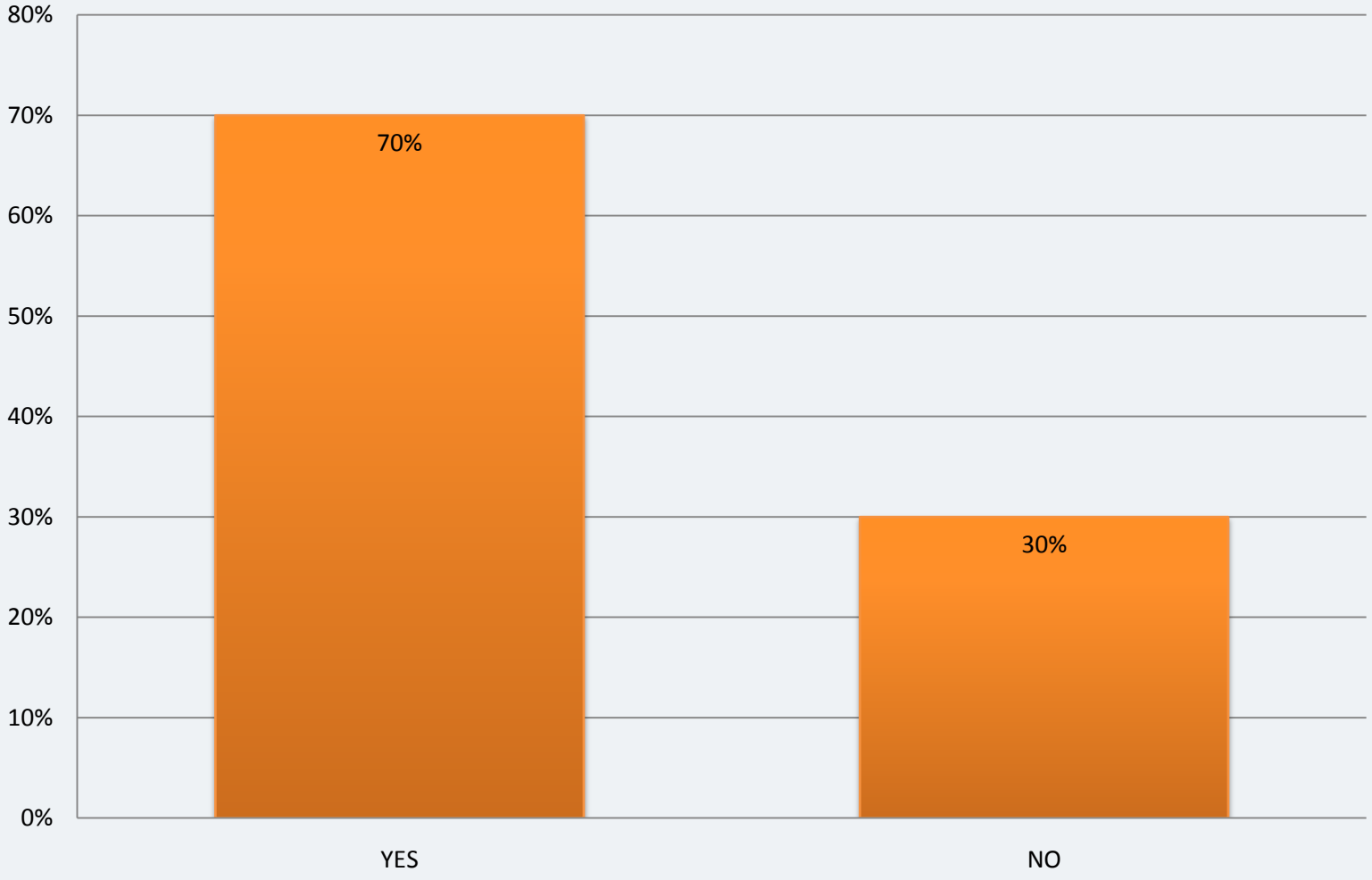


HOSPACCX
INDIA SYSTEMS

GENERAL PUBLIC SURVEY

HOSPACCX
INDIA SYSTEMS

Patients Awaited to Get an Appointment



HOSPACCX
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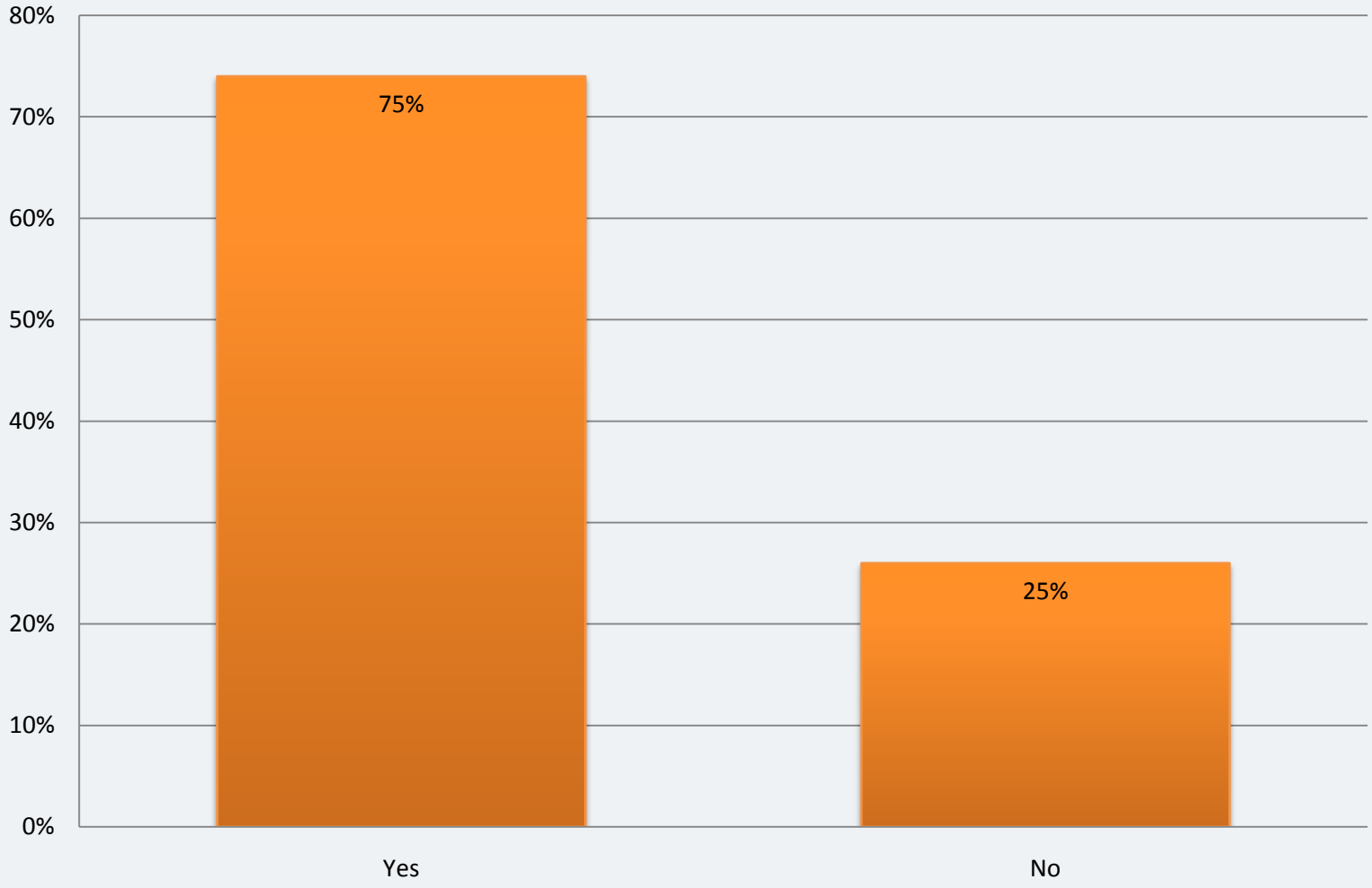
Patients Waited in OPD



Note: *Average waiting time for patients is 30-45 minutes*

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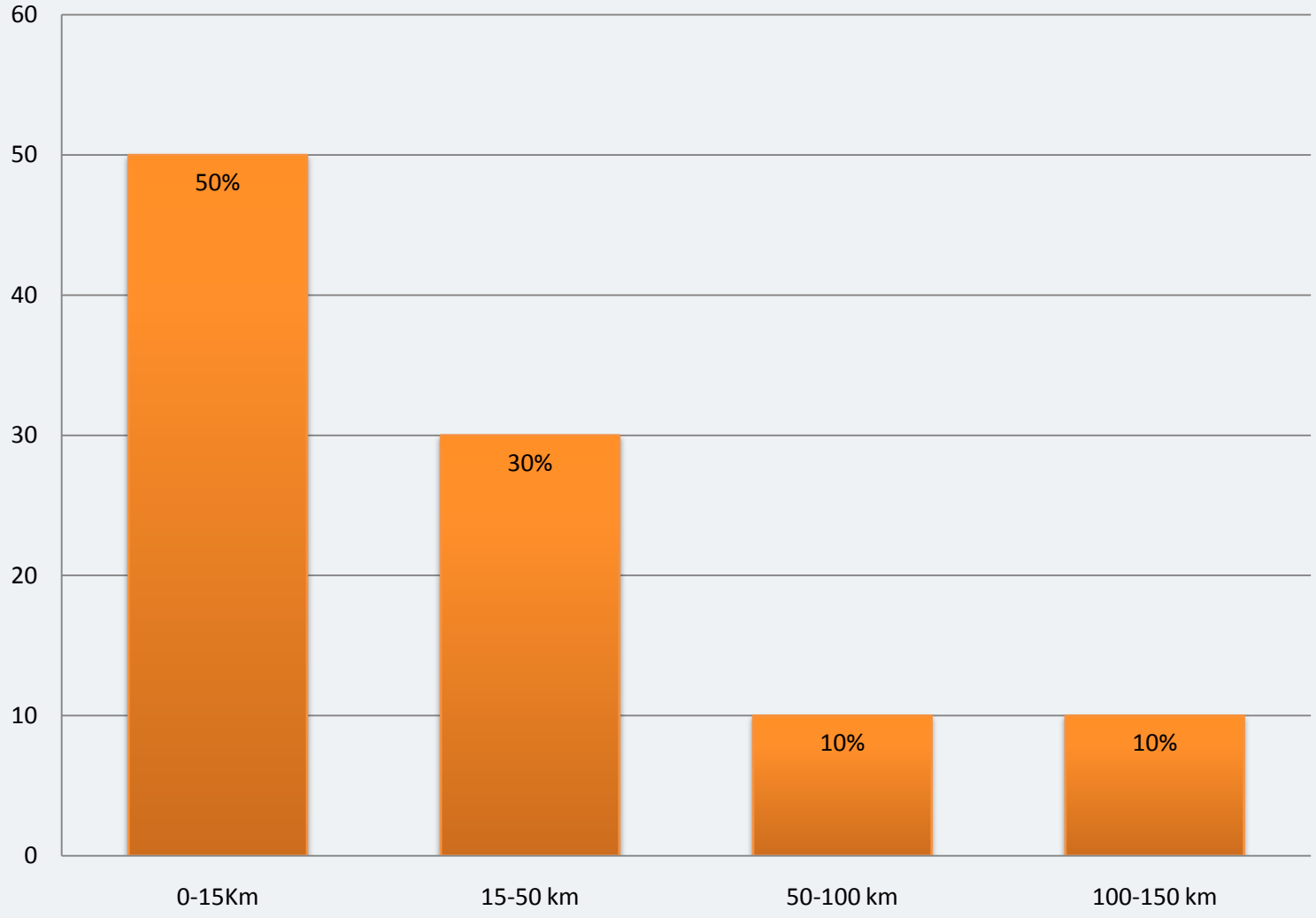
Distance Travelled to get Service



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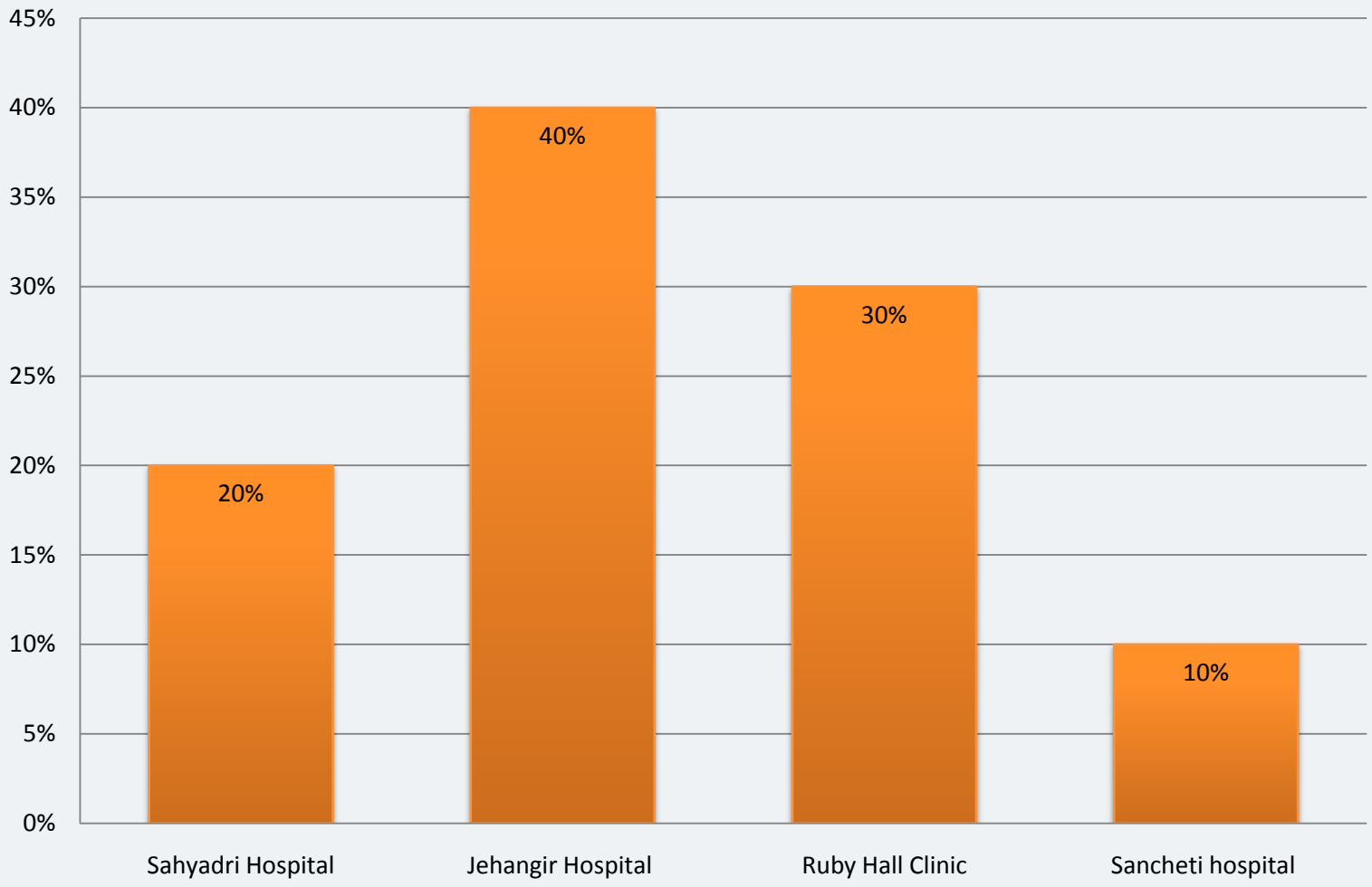
Best Hospital According to General Public



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NEED - GAP ANALYSIS

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PARTICULARS	CATCHMENT AREAS	DISTANCE FROM HOSPITAL LOCATION (km)
Principal Area (0-25 km) 100% Population	Pimpri Chinchwad	7.4
	Akurdi	8.6
	Dehu	14.9
	Nigdi	10.7
	Aundh	13.6
	Pune City	16.9
	Baner	18.4
	Chakan	16.6
	Hinijewadi	16.6
	Lohegaon	19.8
Subordinate Area (25-50km)	Vadgaon	35
	Koregaon	36.5
Peripheral Area (>50km) 25% Population	Narayangaon	60.8
	Ranjangaon	61.1
	Lonavala	55.1

Need Gap Analysis

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Need Gap Analysis	
Primary Service Area Pune	
Estimated Current population of Pune	9426959
Total No. of Beds available currently in Pune	6500
The bed: population ratio in Pune per 1000 population	1.7
The WHO norm for bed per 1000 population	3.3
Total Required no. of Beds	31109
Current Beds Deficit	24609
Pune require additional beds	24609

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PROPOSED FACILITY DESCRIPTION

Bed Distribution

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BED CATEGORY	No. of BEDS
Intensive Care Units:	
ICU	22
Suit	2
Private room	33
Semi Private room	10
General Ward (Male)	25
General Ward (Female)	15
Casualty	4
Total Beds (Including Critical Care Units)	**81**
Day Care	15
OPD Rooms	13
Treatment Room	1

Proposed OT Complex

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OPERATION THEATRES	No. of OT
General	1
Cardiac	1
Neuro	1
Orthopedic	1
Cathlab	1
Major OTs	4+1
Minor OT	1

PROPOSED THRUST AREAS	
Orthopedic surgery	YES
Critical care	YES
Minimal Invasive Surgery	YES
Cardiology & CVTS	YES
Heart Center - Cardiology	
CATH Lab	YES
2D-Echo with Doppler	YES
ECG	YES
Stress Test	YES
PFT	YES
Other Facilities	
Blood Storage	YES
Endoscopy	YES
General Medicine	YES
General Surgery	YES
Orthopedics	YES
Gynecology & Obstetrics	YES
Pediatrics	YES
Dental Surgery	YES
ENT Surgery	YES
Neurosurgery	YES
Neurology	YES
Gastroenterology	YES
Ophthalmology	YES
Physiotherapy	YES
Artificial Kidney Dialysis	YES

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Proposed Diagnostic Services

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DIAGNOSTIC SERVICES:	
Radiology & Imaging:	
M.R.I	YES
CT Scan	YES
Ultra Sound	YES
Computer Radiography System	YES
X-Ray 500 mA	YES
X-Ray 300 mA	YES
Mobile X-Ray 60 mA	YES
Laboratory Medicine:	
Biochemistry	YES
Hematology	YES
Serology	YES
Histopathology	YES
Microbiology	YES
Clinical Pathology	YES
Radio Immuno Assay	YES

Proposed Hospital Location

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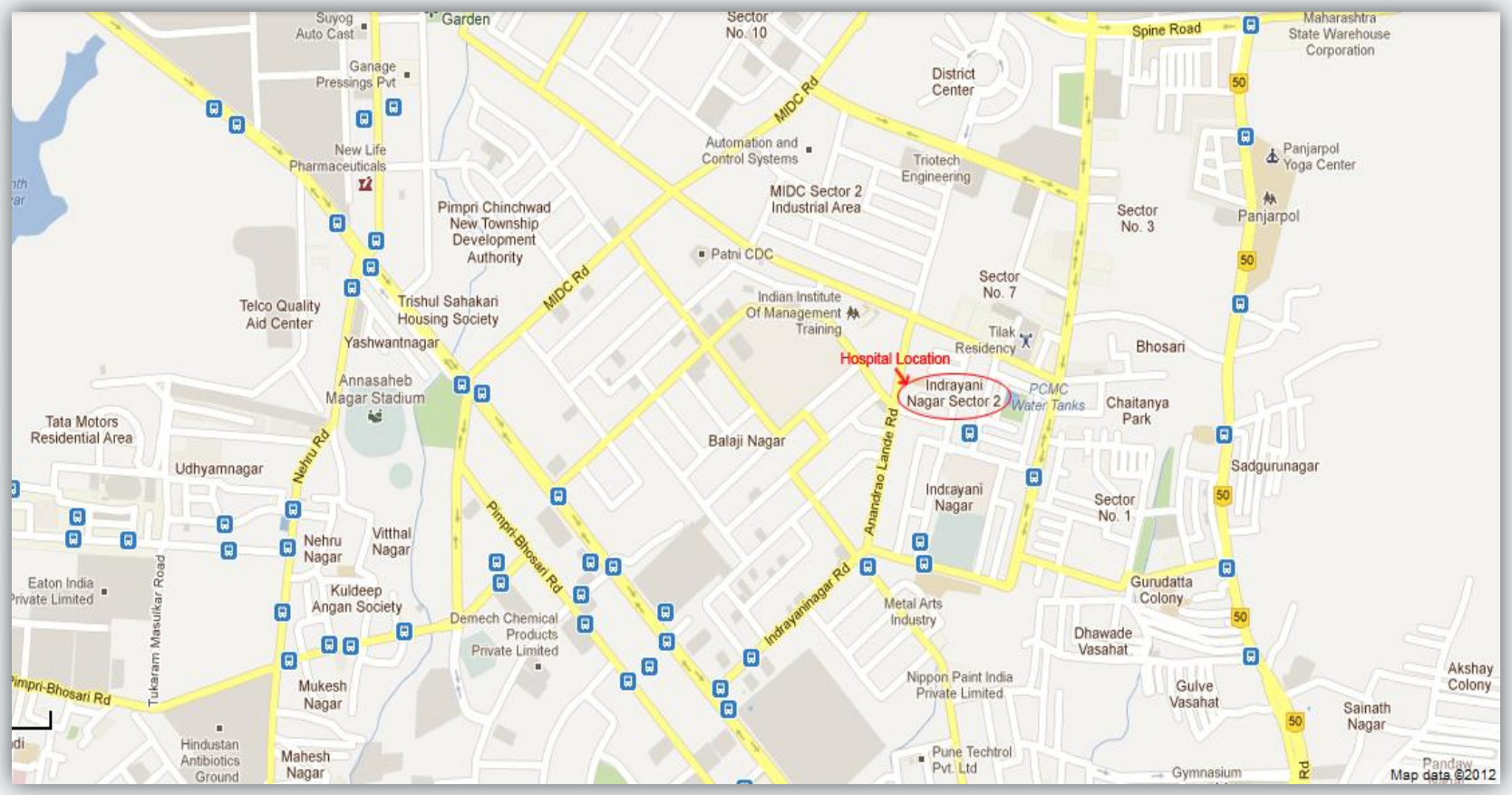

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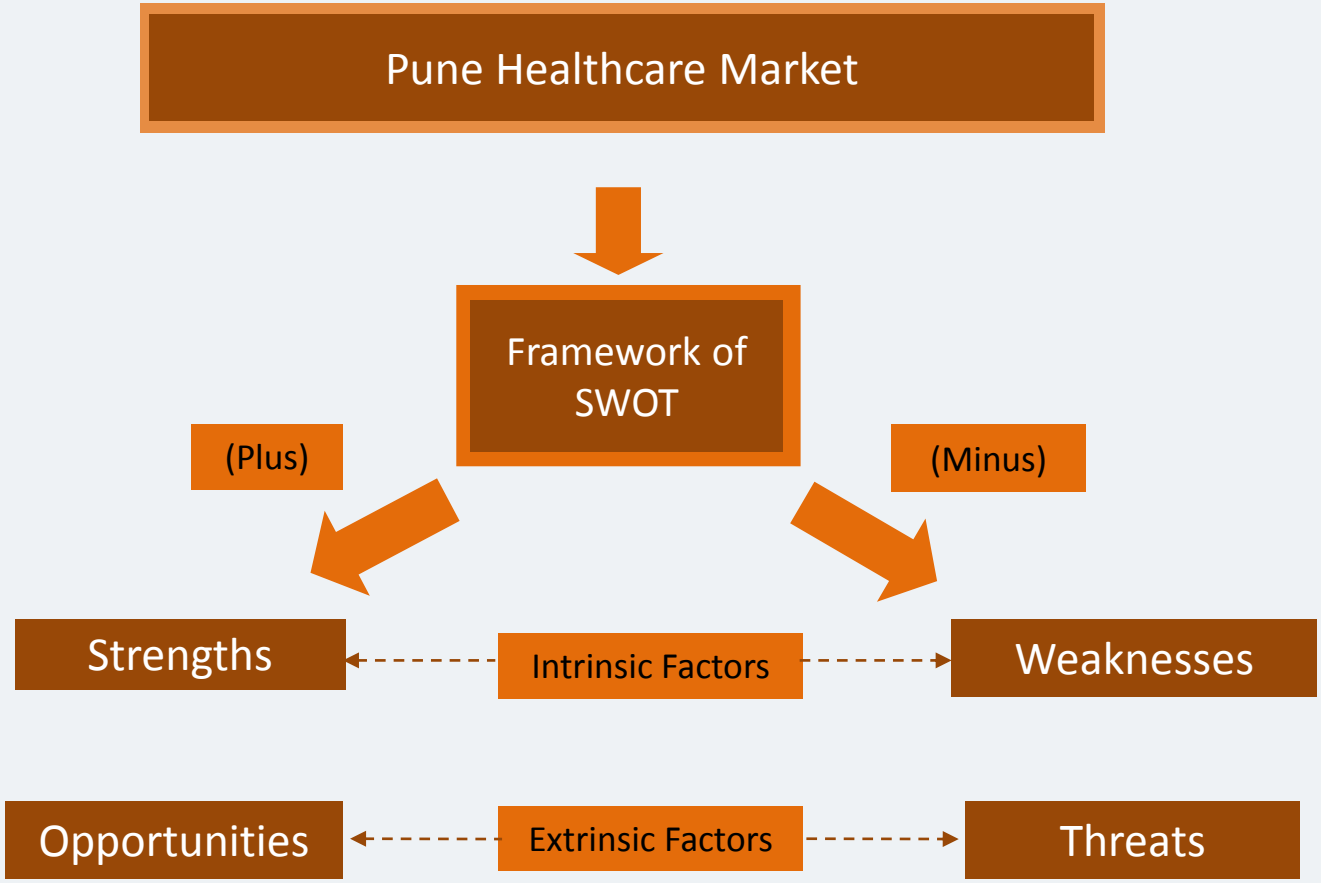
PROPOSED HOSPITAL AT THANE

SWOT Analysis



SWOT Analysis

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Strength:

- Proposed hospital building is ideally located in the heart of the Pimpari Chinchwad area.
- The hospital has ready building & well planned compound with front elevation , which reduces the capital cost of investment.
- Promoter has the ability to get the most renowned practitioners in the Hospital
- Promoter is well networked with the other healthcare providers and vendors.
- Relatively there are very few Healthcare providers which provide superspeciality services.

SWOT Analysis

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Weakness:

- Big corporate players are already established in Pune
- Being a new setup , hospital may take some time to create a brand in the market
- Still people at PCMC are looking forward for affordable healthcare care so we cannot charge premium too.

SWOT Analysis

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Opportunity:

- The gap in between the services available and the services required is huge.
- All the hospitals are running at full capacity & also some of the Hospitals are running short of beds, thus there is a potential market for a new Hospital.
- Increase in life style related diseases .
- There is a potential market of Super speciality services because all the big hospitals are located in the main city .The new set up can trap remaining market area.
- India is a Medical Tourism Hub, so the new Hospital can also focus upon different speacility like bone marrow transplant etc.
- Medical insurance is growing rapidly.
- The upcoming hospital can apply for NABH Accreditation which will be a Quality Certification showcasing it as the finest Hospital in the region.

SWOT Analysis

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Threat:

- Other Corporate Healthcare Players also have an eye at PCMC Market.
- Established and Existing players are also planning for expansion.
- Quick changing technology
- Human Resource Turnover is high.

Deals

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- Valuation of hospitals is based on the following parameters:

  - ✓ Average Revenues/bed
  - ✓ Occupancy ratio
  - ✓ Location
  - ✓ Medical Infrastructure
  - ✓ Cash flow
  - ✓ Value of assets, etc.

- Valuation of hospitals going for leasing is based on following parameters:

  - ✓ Land and Equipment
  - ✓ Number of out-patients/day and in-patient/day
  - ✓ Previous 5 years cash flow & revenues and future cash flow & revenues.

Deals Structuring

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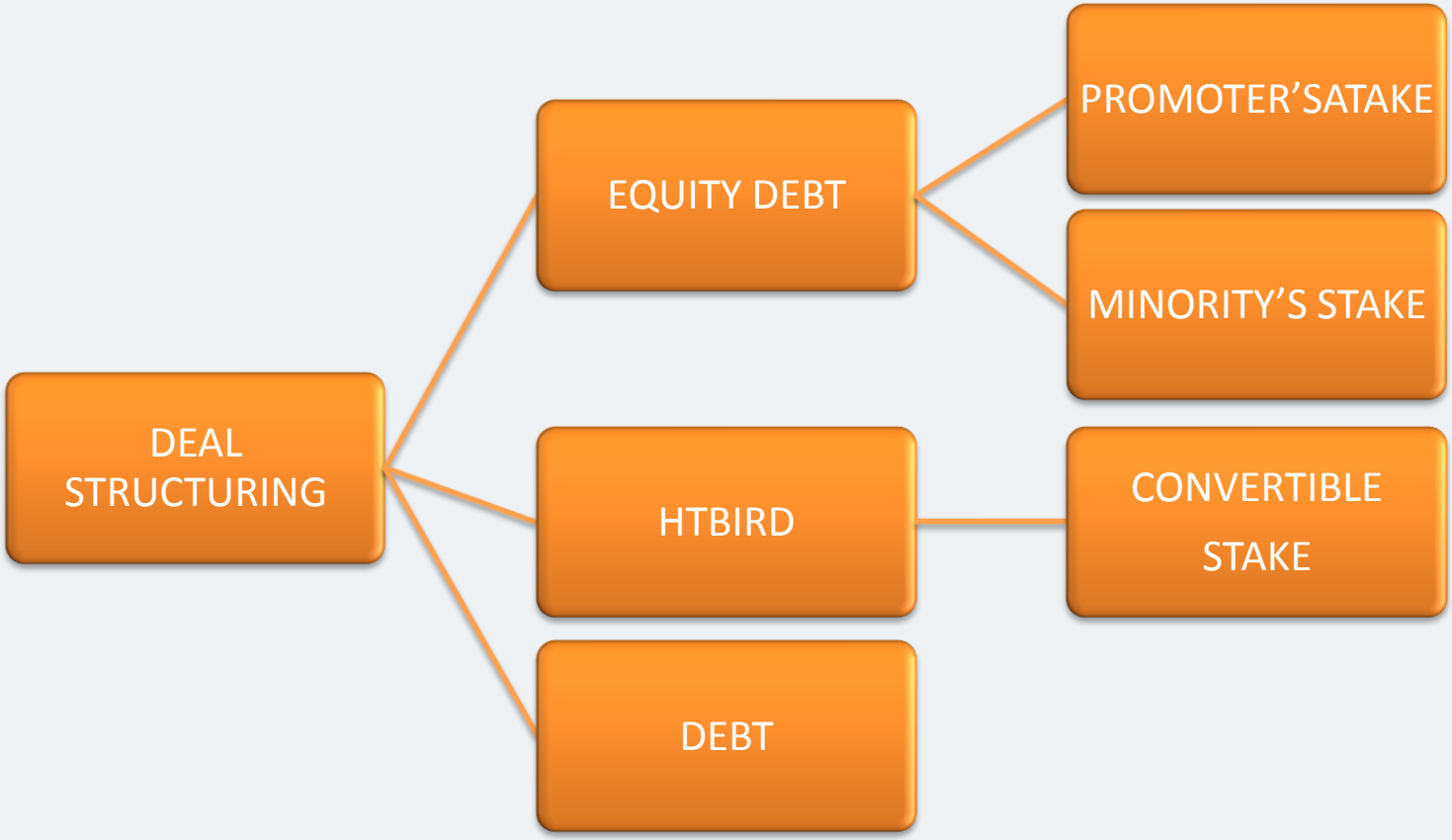

Recent Deals

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- ICICI Venture's Special Purpose Vehicle has invested US$ 35.4 million in Pune-based Sahyadri Hospitals on 27 January, 2008. Sahyadri Hospitals currently runs a 250-bed superspecialty hospital, two secondary care hospitals and one clinic in Pune. Sahyadri Hospitals intends to create a network of hospitals and care centres to reach 1,000 beds in one year and 3,000 beds in three years with an investment of about Rs. 500 crore.

- A quaternary super-specialty Woman and Child Hospital will set up near Pune Expressway by December 2010. This super-specialty centre will be initiated on the lines of the Great Ormond Street Children's Hospital, London, Sydney Westmead Children's Hospital, Australia and Queen Charlotte's Hospital for Women, London. The founders of this ambitious project will give special stress on community health, whereby the poor and needy patients can access state-of-the-art treatments without discrimination.

Hospital Expansion Plans in Pune

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- The healthcare market in Pune is undergoing an interesting metamorphosis with healthcare players foraying into this city and major hospitals slated for expansion. ICICI Venture's Special Purpose Vehicle has invested US$ 35.4 million in Pune-based Sahyadri Hospitals.

- Major corporate giants like Apollo and Wockhardt hospitals have their eyes set on this city and the ones that are already established in the city are slated for major expansion.

- Hiranandani Constructions, promoted by billionaire Niranjan Hiranandani, is planning to set up new hospitals in Pune. The hospitals will be over 100-bed capacity. The total investment in these projects could be around Rs 500 crore.

- Seattle-based investment fund Columbia Pacific will invest close to $70 million in Columbia sia Hospital's India operations It has announced plans of opening two hospitals in Pune. These projects are expected to become operational by 2012.

- Fortis Healthcare plans to invest Rs 1,800 crore for a pan-India expansion, including setting up a super specialty hospital in Gurgaon and another 28 hospitals by 2010. The company plans to tap the western and southern parts of India and intend to have 40 hospitals across 14 States by 2010. The company is targeting to have 7,000 beds, treat 17.5 lakh patients and perform two lakh operations and surgeries annually.

Projected Growth in Number of Beds

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NAME OF THE HOSPITAL	NUMBER OF BEDS IN 2010	EXPECTED NUMBER OF BEDS IN 2012
Aditya Birla Memorial Hospital	500	600
Deenanath Mangeshkar Hospital	100	120
Ruby Hall Clinic	500	600
Sancheti Hospital	150	180
Bhide Hospital	51	60
Sanjeevan Hospital	115	138
Saiba Healthcare Ltd	300	360
Medipoint Hospital Ltd	102	122
Unique Children's Hospital	80	96
Samarath Hoapital	100	120
King Edward Memorial Hospital	550	660

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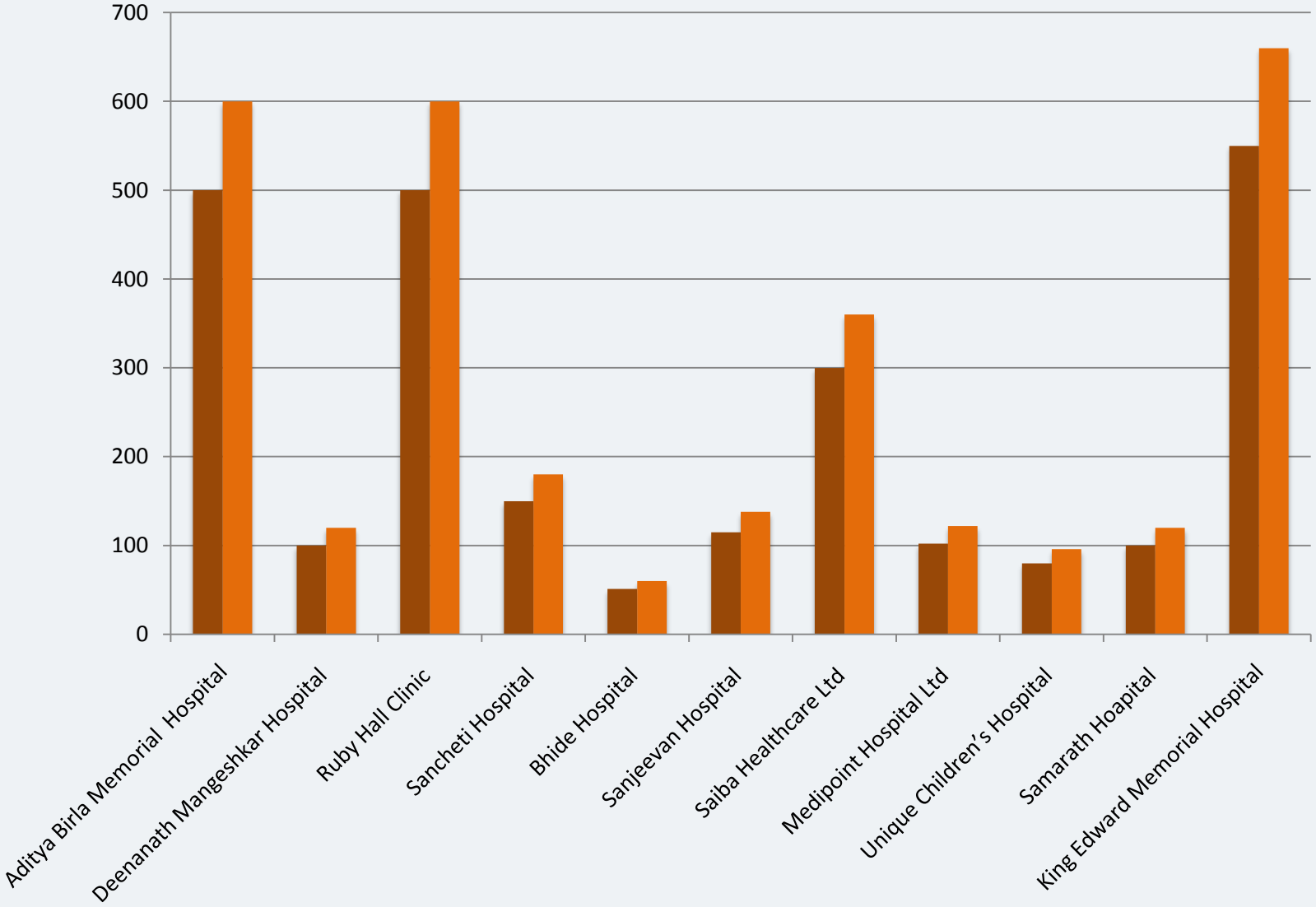

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GROWTH DRIVERS

Government Policy and Tax Benefit

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- To encourage investment in the health care sector, government of India has allowed 100% FDI under the automatic route.

- Government has also accorded the infrastructure status to the hospitals and has announced Lower tariffs (between 5–8 per cent) on medical equipment and devices.

- In a move that would benefit the corporate hospital chains expanding in urban areas, the government has decided to extend its provision of tax relief to new hospitals with over 100 beds in metros and other urban agglomerations, which had been deprived of such benefits till now.

- With a view to encouraging investment in hospitals in non-metro areas, the benefit of sub-section (11B) of section 80-IB had been extended to hospitals located anywhere in India, other than defined “excluded area”.

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- Sub-section (11B) of section 80-IB provides for a tax holiday for five consecutive assessment years, beginning from the initial assessment year, to an undertaking deriving profits from the business of operating and maintaining a hospital in a non-metro.

- The tax relief would also apply to 'new' hospitals with over 100 beds in previously 'excluded area' which includes the urban agglomerations of Greater Mumbai, Delhi, Kolkata, Chennai,Hyderabad, Bangalore and Ahmedabad, the districts of Faridabad, Gurgaon, Ghaziabad, Gautam Budh Nagar and Gandhinagar and the city of Secunderabad.

- Tax benefit is now available to hospitals which are constructed and have started or would start functioning at any time during the period beginning the 1st day of April, 2008 and ending on the 31st day of March, 2013.

- Customs duty exemption on specific personal medical aids like crutches, wheel-chairs, walking frames and artificial limbs.

- Customs duty, excise duty and CVD exemption on specific medical devices such as talking books, Braille computer terminals, etc.

Growth Drivers

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- The increased spending power of middle class is driving growth opportunities for corporate healthcare providers.
- Factors like privatization of medical insurance are making the market more attractive for international & national corporate players.
- Government has taken an initiative to institutionalize a mechanism of Public-Private Partnership in healthcare right up from district level.
- Government have also extended 5 years tax holiday for hospitals more than 100 beds till 2013 not only in rural but also in tier-2 & tier-3 cities.
- Medical Tourism has pegged at USD 350 million and will grow proportionally to USD 2 billion by 2012.
- India has the fastest growing healthcare IT market in Asia, with an expected growth rate of 22%.

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- Govt has allowed foreign direct investment up to 100% in hospital services and up to 26% in healthcare insurance.
- The market for medical devices and equipment in India is estimated to reach nearly US$ 5 billion by 2012.
- Foreign investment has been allowed in all sectors of healthcare in India.
- Govt has reduced custom duty on medical equipments by 5%.
- Import duty on life saving equipment has been reduced from 25% to 5%.
- The rising standard of living along with increased purchasing power and willingness to pay for quality healthcare has led to the emergence of high quality corporate hospitals.
- Changing lifestyle patterns has created a market for preventive and curative care opportunities

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POTENTIAL THRUST AREAS

Potential Thrust Areas

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- Orthopaedics
- Cardiac
- Oncology
- Cosmetic surgery
- Urology
- General surgery
- Bone marrow transplant
- Dental
- High end Obs - Gynaecology with IVF
- LDRP suites
- Day care center
- Diabetic care centre
- High end Diagnostics

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FACTORS CONFIRMING PROPOSED HOSPITAL IS A VIABLE OPTION

Viability of the Hospital

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- Pune is one of the most densely populated areas in Maharashtra.
- Hospital has a Huge drainage area from the surrounding districts.
- Pune is well connected via air with Domestic & International flights, good rail & road network
- There is a huge potential market for medical tourism and be concentrate on the medical tourist.
- The paying capacity of patients in Pune is good.
- The Hospital can provide all services under one roof , with all advanced care facilities. The other existing hospitals provide only basic care, but this will be a tertiary care corporate Hospital providing specialized services.
- There is a huge gap of Hospital beds required in Pune as well as in Maharashtra.
- Project life cycle is reduced as the Hospital Building & compound are already available, thus there will be a faster return on revenue .
- Hospital building has the capacity to absorb the expansion Plan of Hospital.

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THANK YOU !