



January 2015



#### Thinking Aloud

Home - The best place for recuperation - **Jay**

#### Podium

Interview with **Lalit Pai** - Co-founder and CEO of Medwell Ventures and CEO of Nightingales

#### We Recommend

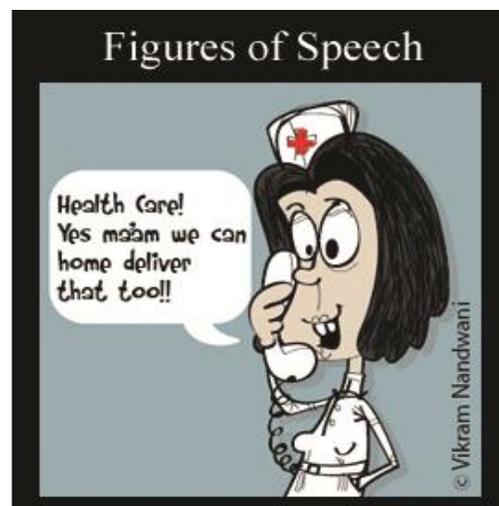
**Articles & Videos**

#### Standing Ovation

**Native Medicare Charitable Trust (NMCT) – Tamil Nadu**

Dear Reader,

One of the country's booming segments is the health care sector growing in terms of both revenues and employment. One such sub-segment within this overall industry is the home based health care sector. The home health care industry includes medical and skilled nursing services, medical equipment, supplies and medication services, personal care, therapeutic services (like physical and respiratory therapy) and psycho-social services (including counselling and spiritual care). Some of the factors driving the growth of this industry include increasing health awareness, improving standards of living, increase in the per capita income of people, developments in portable medical technologies and patients' preference for in-home care.



ET this month features the subject of home-based health care. The home based health care market is growing considerably as the number of people opting for home care services is increasing daily. According to industry statistics, the Indian home care industry is worth between US\$ 2 - US\$ 4 billion, and is growing 25% annually. By 2025, it is estimated that nearly 20% of the Indian population would be senior citizens, and 70% of those over 65 would need long-term health care services. Home care is also one of the fastest growing segments of the FMCG industry and is increasingly drawing the attention of national and multinational players towards this lucrative, yet highly untapped market.

As we enter a new year, ET wishes its readers the very best of 2015!

In **Thinking Aloud**, Jay speaks of the demographic dividend of India; on one side of the fence, we have the youth segment of the overall population, while on the other, the elderly. According to statistics from the National Census Organization, the aged population has risen to 7.4% of the total population. Another study highlighted that this

number will rise from 100 million to 323 million by 2050, which would be about 20% of the national population. From a government policy perspective, this indicates that there will be added pressure for social & medical provisions to meet the special needs of this group and this would also mean that the opportunities in the health care realm will look bright. Due to urbanization, and the multiple pressures it has created, joint families, which accepted the aged members of the family are now breaking down to nuclear families. The rise in chronic ailments also adds to further concerns of the aged. The solution at hand seems to be to create communities for the aged, provide medical assistance at home and home based health solutions, a foreign concept making its way slowly in India.

On the **Podium**, Co-founder and CEO of Medwell Ventures and CEO of Nightingales, Mr. Lalit Pai explains the current state of the Indian home health care sector, and where the country stands in terms of its global peers. The sector is driven by many factors such as growth of chronic diseases, improvement of the average life expectancy in India and technology advancement (devices, data and analysis). Mr. Pai also takes us through his firm Nightingales Home Healthcare, and what makes it distinctive in the industry.

In the **We Recommend** section this month, we share some links to articles extracted from the World Wide Web. These links connect us to reports from global organizations which are related to the current state of the aging population, health care related topics, population trends of the aged and also looks at policy implementations in the health care sector of various countries.

In **Standing Ovation**, we feature Tamil Nadu based The Native Medicare Charitable Trust (NMCT). Started in 1988, this NGO's main activity was initially to conduct research on alternate medicines, bio diversity conservation, environmental protection and waste management, among other activities. NMCT extended its activities later by forming Self Help Groups for tribals and dalits, providing them with some income generation activities. The NGO has been a leader in fostering and supporting the development of community driven approaches to HIV prevention, care and support, and impact mitigation, while at the same time, it works towards reducing the stigma and discrimination among the vulnerable and marginalised communities in the region. NMCT also reaches out to vulnerable women in nine districts of Tamil Nadu through Tailoring trainings and Tailoring schools.

In **Figures of Speech**, Vikram's toon takes health care services to a whole new different level!

As always, we value your opinion, so do let us know how you liked this issue. To visit our previous issues you can visit the Resources section on the website or simply [Click Here](#). You can also follow us on [Facebook](#), [Twitter](#), [Linked In](#) & [Google+](#) - where you can join our community to continue the dialogue with us!



## Thinking Aloud

### Home - The best place for recuperation - Jay

The image of India is that of a nation of youngsters, with speakers constantly harping on the demographic dividend of a country bursting with young talent.

But lost in this rhetoric of 'Youngistan' is that the population of the elderly (aka senior citizens, that is those over 60

years) in India is also showing some dramatic trends. Numbers offered by the National Census organization show that this group has risen to 7.4% of the total population.

Indeed, a study by the United Nations Population Fund (UNFPA) and Help Age International has stated that there will be a sharp increase in the numbers of the elderly in India and that this number will rise from 100 million to 323 million by 2050, which would be about 20% of the national population.

From a government policy perspective what this signifies is that there will be added pressure for social & medical provisions to meet the special needs of this group. And, for the firms in the Health care space, these numbers indicate a sector full of opportunities.

There was a time when society accepted the aged members of the family as part of the larger joint family, and in many respects, they even anchored the joint family. However, urbanization has created multiple pressures, chief of which is the rise of the nuclear family. With the slow shift in social mores and the changing roles in a nuclear family, what we see is the inevitable changes in the family structure. While the elderly may be respected still as grandparents, they are also vulnerable to the pressures of city life where the pace of life demands deep commitments from both husband & wife to their professional challenges, even at the cost of managing children, let alone family elders.

Further, the rise in chronic ailments in such scenarios also adds to the domestic challenges. This in effect presents an interesting paradox: while income levels have gone up in urban India, the change in consumption patterns and the advent of a new lifestyle has effectively put an end to both family time & leisure time. The other major shift that is visible is the case of the Non Resident (NRI) children. So, while money may be available on offer to assist the aging parents, the fact that children are overseas pursuing their professional opportunity, compels many to leave their old parents behind.

There are no easy answers to these conundrums. The solution at hand seems to be to create communities for the aged. Such places provided assisted living support, with specialists who take care of physical, psychological and medical support, all at a specified fee. New projects of this nature are constantly being announced, and over time will create options for different economic segments.

Another, and much more common option is medical assistance at home. Euphemistically called, Home based medical care, this is the answer to a lot of issues particularly for those in need of medical assistance for chronic medical ailments.

This is a concept that has been widely prevalent in the western world and is now slowly making inroads in India.

The rise of chronic modern ailments like Parkinsons, dementia, etc., has created a gap in the market and new firms are coming to the fore to provide succor to the patients – and their families.

A key reason for the success of this model of homecare is the rise of new technological solutions. With more and more doctors suggesting that the best and quickest recuperation happens in the home environment, this option is becoming popular. While cost is a consideration still, the new firms that provide medical support by leveraging technology, offers an attractive option, to those who are willing to break new grounds.

These new generation firms are not just technology players but also are creating a new model where customer care principles are being used to provide empathetic para - medical staff at home who can provide specialist

support to the home based patient. This now an attractive field and Private Equity firms are funding new ventures seeing the opportunity.

Like in other matters, there are challenges faced by the new firms. A key one is the availability of staff who can trained to meet the exacting standards of hygiene and patient care of a high order.

But, all signs are that this field has just started and there is scope for more players who can refine the current models further. Truly, for an entrepreneur, this is a virgin territory to be explored.

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## Podium

### Lalit Pai - Co-founder and CEO of Medwell Ventures and CEO of Nightingales



Lalit is the Co-founder and CEO of Medwell Ventures and CEO of Nightingales – a Medwell-owned Speciality Home Health care enterprise.

An engineer and management graduate by qualification, Lalit has been in the health and pharma domain for more than a decade and in the consulting and IT domain for a decade before that. He is one of the Co-founders at Cytespace Research Management, a clinical research site solutions organization, which is an innovative company focussed on providing solutions in the pharma research world.

His previous experience includes heading the Global Data Management business of Quintiles Transnational, and before that heading the Cardiac Safety business of Quintiles India. He has been involved in building business operations and managing customers across Europe, Japan, South Africa, India, China and the United States at various corporate enterprises. Before embarking on his entrepreneurial journey, he has had stints at global enterprises such as Citigroup, Tata Industries and PricewaterhouseCoopers. He also worked with MphasiS in Singapore and Shanghai as the Business Manager for the South East Asian business.

**ET: What is the current state of the Indian home health care sector? Where does the country rank in the Global Home and Personal Care (HPC) Industry?**

**LP:** The Indian home health care sector is very nascent and is in a constant evolution mode. The earliest players in the industry were unorganized players who were focussed on providing manpower and the industry is only now moving towards more organization, process orientation and technology adoption. Organized competitors and professional participation from the mainstream health care community will boost this industry from the current estimate of US\$ 2 billion substantially.

The more advanced health care markets in the world have all adopted home health care in a substantive manner

and all payers – private, government and insurance – have used home health care services to provide affordable and accessible care to all patients, and not just geriatric patients. This trend is now only just starting in India.

**ET: What are the drivers of the home health care industry in India & how do you see the future for this industry in India?**

**LP:** The primary driver of home health is convenience being offered with a comparable quality of care vis-à-vis hospitals and clinics. There are three mega trends in the Indian health care landscape which aid the growth of the home health care sector:

- (a) Growth of chronic diseases which have overtaken infectious diseases as the highest cause of mortality in recent years. Chronic diseases have to be managed primarily at home because hospitals are designed primarily for acute care situations.
- (b) The average life expectancy in India has improved by 50% over the last 50 years, BUT the prevalence of chronic diseases is expected to increase by 25-40% over the next few decades (Source: World Health Organization, PwC). This means that on an average people are living longer, but with a significant disease burden.
- (c) Technology – which affects health care in two main ways – first, because more devices are being made available in a portable form and can be operated in the home context, and second, because data from these devices can be sent from home to a central control centre to help patients to be monitored remotely.

These three mega trends combined with the fact that the Indian social fabric is quickly adapting to a nuclear family with high levels of disposable income but without time on hand will make the convenience of home health care highly desirable.

The outlook for the home health care industry is therefore positive not just because it is starting with a low base but also because the demand for the services far exceeds the supply.

**ET: As a nascent industry in the country, there are bound to be challenges for its growth. Please share some of the challenges that you encounter in building the business.**

**LP:** The most important challenge is organizing the supply side of the business. The industry requires consistent delivery organized around protocols and standards. This is the only way quality can be built into the industry and all players in the industry have to get organized around this aspect.

Nightingales has invested substantially in redefining home health care in India itself by defining protocols for multiple disease areas and also for training our staff in the assessment and execution of these protocols. This makes the outcome for patients consistent and not dependent on who does each visit.

Nightingales has also invested in building programs for constantly monitoring and improving service levels. It is important to understand the service level expectations from customers, monitor and, hopefully, exceed these expectations on a regular basis. Service recovery also have to be managed consistently since no service is fail proof.

**ET: How is technology being used in this industry to create unique benefits both to the patients and the Health care professionals?**

**LP:** There are multiple touch points for technology to make significant impact on health care. There are three that we focus on:

- (a) Devices - which are becoming increasingly smaller and smarter. The footprint of an ECG device, for instance, has reduced from a A3 size (30cm by 42cm) to small devices that fit into the palm of your hands. The earlier devices would only print hard copies, now they transmit the data wirelessly. This has meant more data can be acquired from patients and over a longer period of time.
- (b) Data – internet and mobile access penetration has meant that the devices and wearables now which push data to the cloud effortlessly and (relatively) cheaply. This has meant that the person reviewing the data need not be near the patient.
- (c) Analysis – long term data trends from individuals, collected across multiple parameters would eventually lead to pattern recognition and anticipation of medical requirements. This is still distance away but the trend is definitely palpable.

**ET: Can you please share what makes your firm, Nightingales Home Healthcare, distinctive in the industry?**

**LP:** Nightingales is distinctive in that our services are delivered for specialty diseases in a standard protocol model which assures consistency to the patient – there is an emphasis on creating longer term subscription models so that a relationship of value is built between the patient and Nightingales.

This, when combined with the convenience of delivering the service at home and at a comparable quality to hospitals, would create a service delivery framework which creates a distinct Nightingales Care Model. This Model is developed in consultation with leading medical professionals who form part of the Medical Advisory Board of Nightingales.

Currently, the Model works for management of stroke, pulmonology, wounds, dementia and infusion therapy and for the 6,000+ customers who have built a long term relationship with Nightingales.

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## **We Recommend**

### **Articles & Videos**

The World Wide Web offers us a plethora of data and information on various topics. This month we look at links to some research work by global organizations - these are related to the ageing population, the world health care situation, a situation analysis of the ageing population of India and related programme initiatives in this realm:

#### **1. Ageing in the Twenty-First Century: A Celebration and A Challenge**

Ageing in the Twenty-First Century: A Celebration and A Challenge, is an innovative report published by United Nations Population Fund (UNFPA) and Help Age International. The report highlights the current situation of older

persons and reviews progress in policies and actions taken by governments and other stakeholders. It provides many inspiring examples of innovative programmes that successfully address ageing issues and the concerns of older persons. It makes the case for governments, NGOs, global institutions, and civil societies to fully commit to a concerted global effort to realign the 21st century society to fit the realities of 21st century demographics.

**Link:**

<http://www.unfpa.org/sites/default/files/pub-pdf/UNFPA-Exec-Summary.pdf>

**Video:**

<http://www.helpage.org/resources/ageing-in-the-21st-century-a-celebration-and-a-challenge/>

## **2. Global Health and Aging – WHO**

The world is facing a situation where there are older people than children and more people at extreme old ages than ever before. As both the proportion of older people and the length of life increases throughout the world, key questions arise. Will population aging be accompanied by a longer period of good health, a sustained sense of well-being, and extended periods of social engagement and productivity, or will it be associated with more illness, disability, and dependency? How will aging affect health care and social costs? Are these futures inevitable, or can we act to establish a physical and social infrastructure that might foster better health and wellbeing in old age? How will population aging play out differently for low-income countries that will age faster than their counterparts have, but before they become industrialized and wealthy? This WHO report attempts to address some of these questions.

**Link:**

[http://www.nia.nih.gov/sites/default/files/global\\_health\\_and\\_aging.pdf](http://www.nia.nih.gov/sites/default/files/global_health_and_aging.pdf)

## **3. Situation Analysis of The Elderly in India - Central Statistics Office Ministry of Statistics & Programme Implementation**

The phenomenon of population ageing is becoming a major concern for policy makers all over the world, for both developed and developing countries, during last two decades. But the problems arising out of it will have varied implications for underdeveloped, developing and developed countries. In India, the size of the elderly population, i.e. persons above the age of 60 years is fast growing although it constituted only 7.4% of total population at the turn of the new millennium. For a developing country like India, this may pose mounting pressures on various socio economic fronts including pension outlays, health care expenditures, fiscal discipline, savings levels etc. This publication, by the Central Statistical Office, proves to be useful to planners and policy makers, as well as to research workers, and will help in enhancing their understanding of the problems of the elderly in the country.

**Link:**

[http://mospi.nic.in/mospi\\_new/upload/elderly\\_in\\_india.pdf](http://mospi.nic.in/mospi_new/upload/elderly_in_india.pdf)

#### 4. The emerging market in health care innovation

This report is the fourth in the series World Population Ageing. The present report, which updates the 2007 and 2009 editions, provides a description of global trends in population ageing and includes new features on the socio-economic and health aspects of ageing. This UN report is accompanied by an interactive database on the Profiles of Ageing 2013.

**Link:**

<http://www.un.org/en/development/desa/population/publications/pdf/ageing/WorldPopulationAgeing2013.pdf>

#### 5. The Big Idea: How to Solve the Cost Crisis in Health Care

Currently, global trends have highlighted that health care costs are increasing; related costs in the US currently exceed 17% of GDP and continues to rise. Other countries spend less of their GDP on health care but have the same increasing trend. The drivers of this increase are the aging population and the development of new treatments. There is an almost complete lack of understanding of how much it costs to deliver patient care, much less on how these costs compare with the outcomes achieved. Instead of focusing on the costs of treating individual patients with specific medical conditions over their full cycle of care, providers aggregate and analyze costs at the specialty or service department level.

**Link:**

<https://hbr.org/2011/09/how-to-solve-the-cost-crisis-in-health-care>

**Note: To access the entire article, you are required to register online on Harvard Business Review**

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## Standing Ovation

**Native Medicare Charitable Trust  
(NMCT) – Tamil Nadu**



Native Medicare Charitable Trust began its operations in 1998 with research on alternate medicines, bio diversity conservation, environmental protection, waste management and forestry seeds collection organization of adivasis in tribal villages. NMCT later extended its activities by forming self-helpgroups for tribals and dalits, providing them with capacity building and income generation activities.

The second phase of NMCT focused on health and hygiene with emphasis on HIV/AIDS, reproductive and child health, and education to the unreached tribals of Anaikatty Hills, providing them a sustainable livelihood. A grant from the Tamil Nadu AIDS Initiative that focused on transforming the lives of 1,500 male sex workers liberating them from poverty, exploitation and other health challenges in Coimbatore district.

At present NMCT is implementing four important new projects: Care & support for HIV/AIDS infected and affected families and HIV prevention project in 4 blocks of Pollachi supported by KKS-BMZ, Germany, Integrated Tribal Development Project in tribal village Anaikatti funded by NABARD, Chennai, Prevention of HIV/AIDS programme among migrants in Tirupur district supported by TANSACS & Silai School Project in 6 six districts of Tamil Nadu.

### **Vision**

“Sustainable holistic development among the underserved”

### **Objectives**

- To create awareness among the public, industrial workers and sex workers on prevention of HIV/AIDS
- To provide care & support to the people living with HIV/AIDS and children infected/affected by HIV/AIDS
- To undertake children focused programs on welfare and development and also maintaining a care home for the children affected by the HIV/AIDS and other vulnerable children
- To improve the livelihood sustainability of hill tribes by promoting capacity building and empowerment and supporting for their social development through agriculture, forestry, animal husbandry & other livelihood activities
- To undertake programmes on natural resources management and environment protection

### **Initiatives**

- Adivasi Development Initiative
- Abhaya Students Shelter
- Care & Support for HIV/AIDS Infected & Affected Project
- Tribal Development Project
- Migrants Intervention
- Vimuktha Federation
- Volunteers Programme

To know more about this organization, please visit <http://nmctngo.org/>.

For its cause, NMCT deserves a standing ovation!

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