

Feasibility Study for 250 Bed Hospital in Nagpur

By

Archit Zomin Prashad

*Dissertation submitted for the partial fulfillment of the
MBA Hospital and Health Management*

Academic year, 2015-2017



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TO WHOMSOEVER MAY CONCERN

This is to certify that **Dr. Archit Zomin Prashad** student of MBA Hospital and Health Management from The IIHMR University, Jaipur has undergone internship training at **PricewaterhouseCoopers, Mumbai** from **February 2017 to June 2017**.

The Candidate has successfully carried out the study designated to him during internship training and his approach to the study has been sincere, scientific and analytical.

The Internship is in fulfillment of the course requirements.

I wish him all success in all his future endeavors.



Col. (Dr.) Ashok Kaushik

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The certificate is awarded to

Dr. Archit Zomin Prashad

In recognition of having successfully completed his project while doing his
Internship in the department of

Management Consulting (Healthcare)

The project was on

Feasibility Study for 250 Bed Hospital, Nagpur

Commenced from

From 20th Feb 2017 to 17th May 2017

In PricewaterhouseCoopers Pvt.Ltd

And will be continue working with PwC till 16th June 2017

He comes across as a committed, sincere & diligent person who has a strong
drive and zeal for learning.

We wish him all the best for future endeavors.

Yours faithfully,
For PricewaterhouseCoopers Pvt. Ltd.

Ian Soares
Associate Director -Human Capital

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CERTIFICATE BY SCHOLAR

This is to certify that the dissertation titled **Feasibility Study of 250 Bed Hospital in Nagpur** and submitted by **Dr. Archit Zomin Prashad** Enrollment No **IIHMR-U/01/2015-17/0262** under the supervision of **Dr. Anoop Khanna** for award of MBA in Hospital and Health Management of the University carried out during the period from **FEBRUARY 2017** to **JUNE 2017** embodies my original work and has not formed the basis for the award of any degree, diploma associate ship, fellowship, titles in this or any other institute or other similar institution of higher learning.



Signature

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CERTIFICATE BY SCHOLAR

This is to certify that all ethical issues have been considered while collecting data for my dissertation titled **“Feasibility Study of 250 Bed Hospital in Nagpur”**

A handwritten signature in blue ink, appearing to be 'A. P.', is written over a horizontal line. Below the line, the date '18/5/17' is written.

Signature of student

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Acknowledgment

A journey is easier when you travel together. Interdependence is certainly more valuable than independence. This project report is the result of three months of training whereby I have been accompanied and supported by many people. It is a pleasant aspect that I now have the opportunity to express my gratitude for all of them.

I convey my heartfelt thanks to Mr. Abhishek Singh, Director PricewaterhouseCoopers, Mumbai for granting me the opportunity to work with this resourceful organization.

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At last I would like to express my adoration and regards to my family as well as friends for their patience, consistent motivation and affection for me to surpass the hurdles in my life.

GLOSSARY

%	Percentage
ALOS	Average Length of stay
ARPOB	Average Revenue per occupied bed
Bn	Billion
c.	Estimate
CABG	Coronary Artery Bypass Grafting
CAGR	Compound Annual Growth Rate
Capex	Capital expenditure
CT	Computed Tomography
CVTS	Cardiovascular Thoracic Surgery
EBIDTA	Earnings before Interest, Depreciation Taxes and Amortization
FY	Financial Year
GDDP	Gross Domestic District Product
GDP	Gross Domestic Product
HCG	Healthcare Global
HN	Harkisandas Narottamdas hospital
IGRT	Image-guided radiation therapy
INR	Indian National Rupee
IPD	In-patient department
KDAH	Kokilaben Dhirubhai Ambani Hospital
MMR	Mumbai Metropolitan Region
Mn	Million
MRI	Magnetic Resonance Imaging
NABH	National Accreditation Board for Hospitals and Healthcare Providers
NCD	Non Communicable disease

No.	Number
OPD	Out-patient department
Opex	Operational Expenditure
Ortho	Orthopaedic
OT	Operational Theatre
p.a.	Per annum
PE	Private equity
PET CT	Positron Emission Tomography - Computed Tomography
PTCA	Percutaneous transluminal coronary angioplasty
RGJAY	Rajiv Gandhi Jeevandayee Arogya Yojana
ROI	Return on Investment
Sq.ft.	Square Feet
THR	Total Hip Replacement
TKR	Total Knee Replacement
TMH	Tata Memorial Hospital
USD	United States Dollar
YoY	Year on Year
YTD	Year to date

Executive Summary

Nagpur has the unique distinction of being located to the ZERO MILE of India. The only city to be equidistant from all the major metro cities of India. At the same time it is connected to all the cities by rail routes and highways. Nagpur is already a business hub, an education destination of central India. Spread over the area of 250 sq. kms. It is surrounded by waste expenses of farm, forest with conserve with conserve wildlife from tracks of land rich in minerals. Well renowned company in IT sector TCS, plane manufacturing company BOEING, and pharmaceutical company LUPIN have invested more in Nagpur.

Multi-model International Hub Airport at Nagpur “**MIHAN**” is one of a kind vision that will set the parading for futuristic urban development. A model that will successively sustain industrial commercial and residential growth within an environmental balance with the total estimated cost of INR 3,000Million. The metro lines will be commissioned progressively, with the southern and western links expected to be completed and operational by June 2018 and September 2018 The whole project would be operational by March 2019. Apart from airport is a special economic zone. Rail and rope terminals helps city and residential township evolving into composite and integrated commercial nerves center. The MIHAN airport covers the area of 1200 ha. of the total area of the project ie; 4025 ha. Rail and road terminals is just along the mail railway line covering the area of 28 hectares. A Special Economic Zone (SEZ) is also coming with residential zone covering the total area of 40.25 kms on the southern end of Nagpur.

Mumbai – Nagpur super expressway is also one of a special road connectivity. The super-expressway is short of 800 km from the longest one. Maharashtra Government has sanctioned major infrastructure projects worth whopping INR 52,000 Cr. out of which the govt. cleared way for INR 40,000 crore Super Communication Express way from Nagpur to Mumbai which will change the economy very soon. Since the entire north south and east west bound road traffic is passing through the city of Nagpur the proposed outer ring road will be constructed to decongest the traffic in the city and to take the precious time the vehicle uses and providing better connectivity to Nagpur Mumbai. Nagpur outer ring road project is divided into 2 packages with the total cost of rupees 1170 Cr. and the construction period is 30 months from 15th October 2016.

It is because of its geographical location Nagpur has become a cosmopolitan characterized city. It became a good place for the organizations in terms of diversity. Nagpur is at no. 1 position for its education and health services. According to literacy rate 2013 Nagpur is on number 1 position. It is on no. 4 according to human development indicators (HDI). The literacy rate of Nagpur is 92%. It is the highest literacy rate in Maharashtra. Nagpur has 3 medical colleges out of which 2 are govt. and 1 is private.

Upcoming project All India Institute of Medical Sciences (AIIMS) with the investment of INR 1600 Cr. with the total capacity of 960 beds along with a Medical college with all types of modern services and residential facilities. NATIONAL INSTITUTION OF PHARMACUTIAL EDUCATION AND RESEARCH to be built in Nagpur going to produce a whopping number of professionals every year. 237 acre of land under MIHAN would be given to Nagpur project and setting up the Indian Institute of Management there. Out of which 37 acre would be given for Nagpur metro project and the rest 200 acre for setting up the premier institute.

The Nagpur city has some of the iconic trust institutes like Wockhardt Heart, Orange City, Alexis, Platina and Meditrina etc. The city used to get a significant number of patients from tier II and tier III cities in Maharashtra as well as neighbouring states like Madhya Pradesh, Gujarat and Chhattisgarh; however the same has declined to 25% of the overall patients due to facilities coming up in those areas.

Background

In Nagpur, there is a 200 bedded hospital going to build, a global healthcare group wants to acquire it to enter the Indian healthcare market.

Client wants PwC to do the feasibility study in Nagpur market and to understand the market potential for acquiring the hospital.

Feasibility study

A feasibility study aims to objectively and rationally uncover the strengths and weaknesses of an existing business or proposed venture, opportunities and threats present in the environment, the resources required to carry through, and ultimately the prospects for success.

Benefits

Conducting a feasibility study is always beneficial to the project and it gives a clear picture of your idea. Below are the top benefits of this study:

- Gives focus to the project and alternative outline.
- Narrows the business alternative.
- Identifies the reason to do the project.
- Enhances the success rate by considering multiple factor.
- Helps in decision making of the project.
- Provides a detailed documented status to the business.

Issues and challenges

- Gathering of the primary inputs.
- Setting of interviews with various Healthcare professionals in hospital.
- Getting to the number of nursing homes and hospital in Nagpur.

Problem Statement

In Nagpur most of the hospitals are single specialty. Very few multispecialty hospitals are present in the market. Residents in Nagpur have to travel to Mumbai to avail tertiary healthcare facility. There is a demand for more of multispecialty hospital in the city. So there is a 200 bedded hospital to be made in Nagpur which a client wants to acquire it to enter the Nagpur healthcare market serving all the specialties under one roof.

Research Question

Is there a feasibility for one more hospital to be setup in Nagpur, to provide tertiary healthcare facility that caters the residents of Nagpur?

Review of literature

PwC proprietary methodologies and reports available in the public domain.

Aim

To understand Feasibility for opening up a Hospital in Nagpur.

Objectives

General

To understand the feasibility for a hospital in Nagpur market

Specific

- To assess the need of the area.
- To obtain demographics of the particular area.
- To assess the Consultant Engagement Model.
- To identify and analyze competitors market.

Methodology

- Study type - A mix of primary and secondary research. Data analysis of the gathered data to arrive at the feasibility.
- Area of study- Nagpur and nearby districts.
- Data Collection method:

Data was collected through face to face interviews with multiple sources that included doctors, administrators, equipment suppliers etc. through pre-designed structured questionnaire.

Key Questions

1. Volumes for key procedures in major hospitals – Joint replacements, angiographies, PTCA, CABG, deliveries , Oncology,
2. Key doctors across specialities in the city
3. Bed mix
4. Underserved specialties in the city
5. Patient mix – Cash, Insurance, Corporates, PSU's
6. Drainage area for patients (City, Suburbs of Mumbai and Thane)
7. Flow of patients from Thane to Mumbai hospitals
8. Patient referral system
9. Price points for Key procedures viz. Joint replacements, angiographies, PTCA, CABG, deliveries , bed categories
10. Physician engagement model for key doctors (retainer, fee sharing, retainer+ fee sharing) and doctor payout % in surgeries.

11. Expansion/Upcoming plans for major hospitals in the vicinity

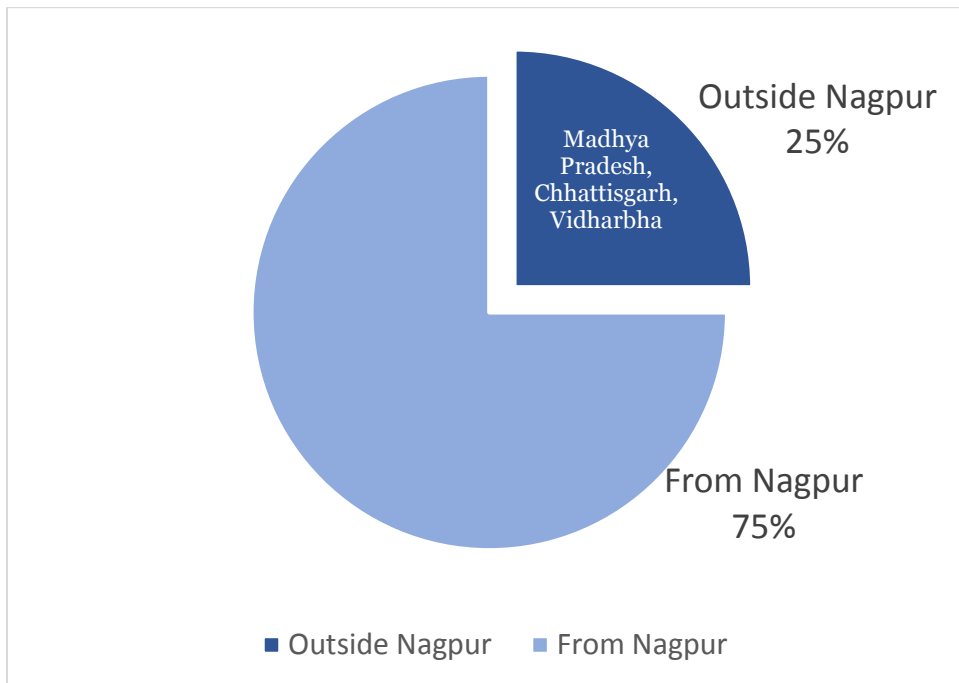
12. Salaries for key personnel Viz Nurses, Technicians, pharmacists, RMO's

- Sources of Data- Primary data from Doctors(20), administrators(10), suppliers(10) were collected
- Sample Size – 2-3 doctors from each specialty were considered.
- Sampling Technique- Stratified Sampling. Few physicians were selected for 5 key specialties for the study.

Result and Discussion

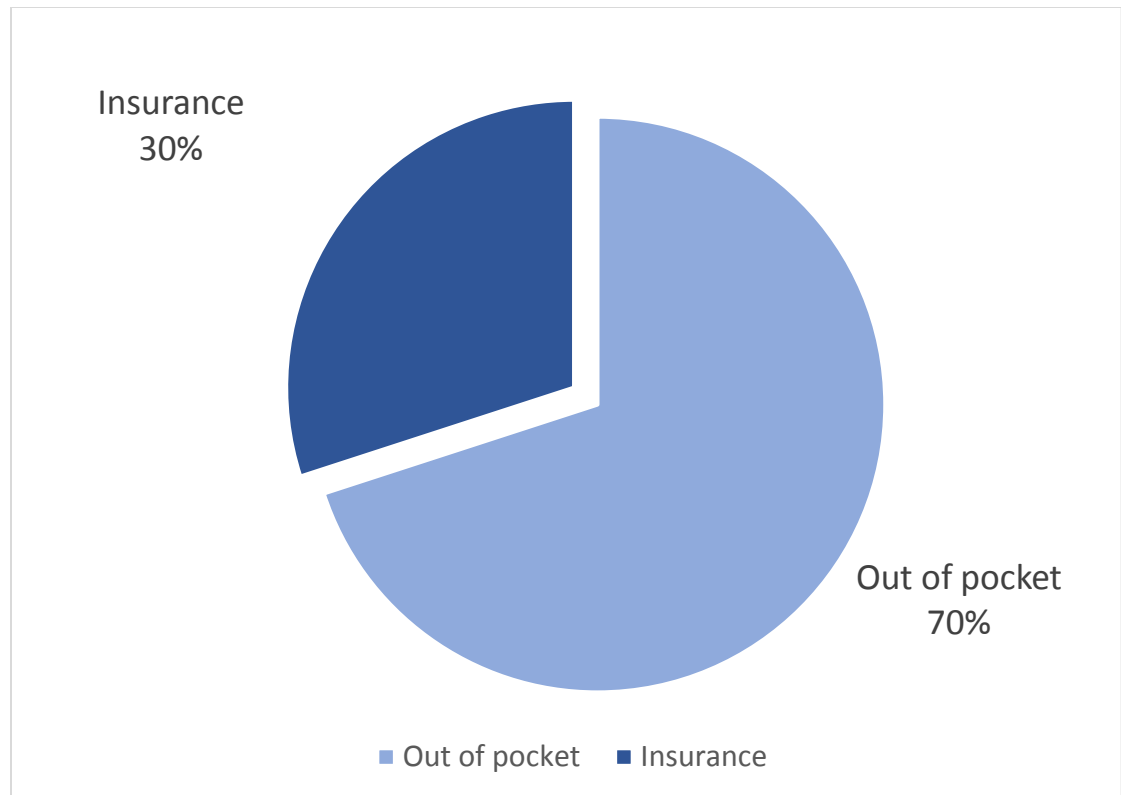
- **Nagpur**

1. ~75% of the patient drainage of the major hospitals in Nagpur is from within



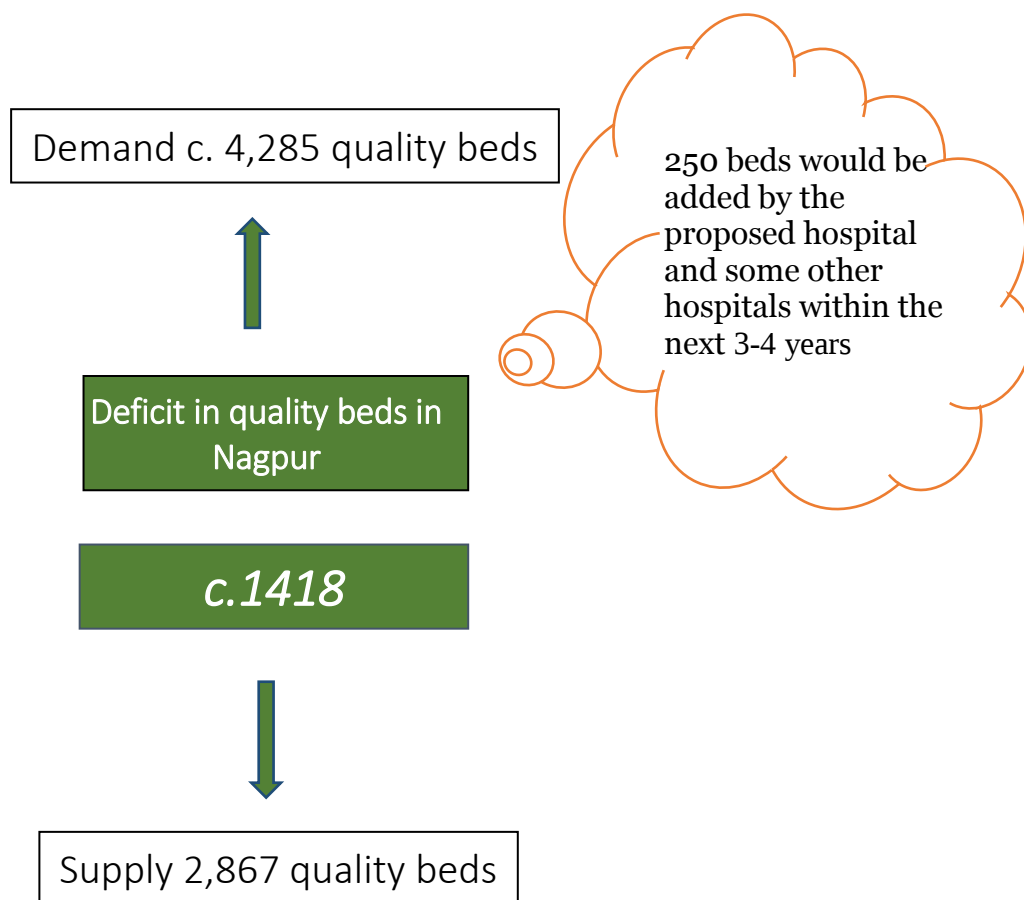
2. Overall~70% of the patients pay from out of pocket to meet their healthcare requirements

- The majority (~70%) of patients availing services in the private sector pay out of pockets, demonstrating small proportion insurance penetration.
- ~ 30% of patients have some form of insurance including private health insurance, public health insurance, government schemes like Rajiv Gandhi Jeevandayee Yojana, etc.
- The pay outs for government schemes vary between 4-8 months with chances of rejections, which hampers the hospitals cash flows.
- Rajeev Gandhi Jeevandayee scheme was launched by the state government in 2012 covering the Below Poverty Line (BPL) families (Annual income less than 100,000 INR) across state.
- Under this scheme, BPL families can avail treatment upto 150,000 INR per year in empanelled hospitals with a special provision of upto 250,000 INR for kidney transplants.
- Care, Meditrina, Orange City are the major hospitals who have empanelled under this scheme primarily to build volumes

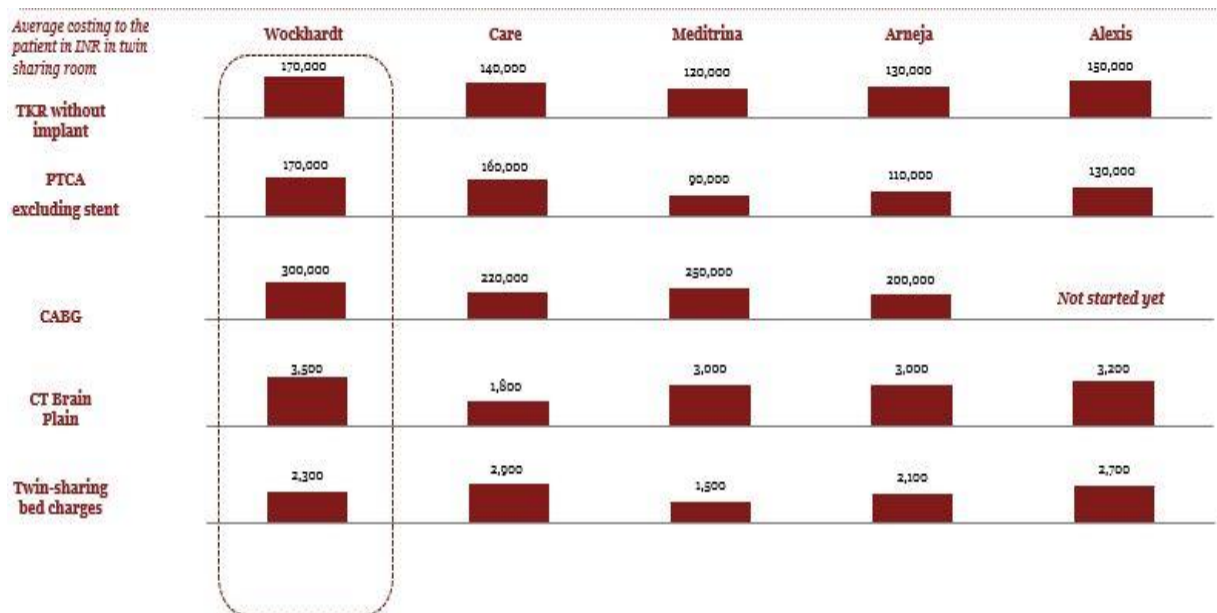


3. Historically, inflow of patients to hospitals in Nagpur was high on account of limited access to good healthcare in other cities. However over time, this scenario has changed.
- With Shalby hospital and CHL Hospital in Indore, Wockhardt hospital in Nashik, other multispecialty hospitals in the nearby division, inflow of patients from these cities has declined, since they are able to get services within their cities.
 - Patients prefer to come to Nagpur for high end tertiary care services like Liver Transplants, Oncology etc.
 - Flow of patients to Nagpur is primarily from Madhya Pradesh, Chhattisgarh and from nearby divisions of Nagpur.

- Hospitals have created centres of excellence for which patients do travel to avail medical treatments. E.g.: Platina Heart Hospital is known for Cardiology, Sushrut Hospital for Orthopaedics and Wockhardt for Cardiac Surgeries.
 - The Nagpur has a total population size of c. 2.63 Million; the market is dominated by unorganised players with wockhard being the major multispecialty healthcare provider.
4. Currently, Nagpur has a deficiency of c. 1418 quality beds, which is poised to increase further considering the growing population of the target areas.



- Wockhardt Hospitals is the only high end tertiary care hospital in the city of Nagpur with a corporate structure. In a short span of time, it has established itself as a clear market leader in terms of size and revenue by leveraging first mover advantage.
- Wockhardt commands premium pricing in Nagpur when compared to its peers; Alexis is expected to charge higher in coming years as it has better infrastructure and service offering.

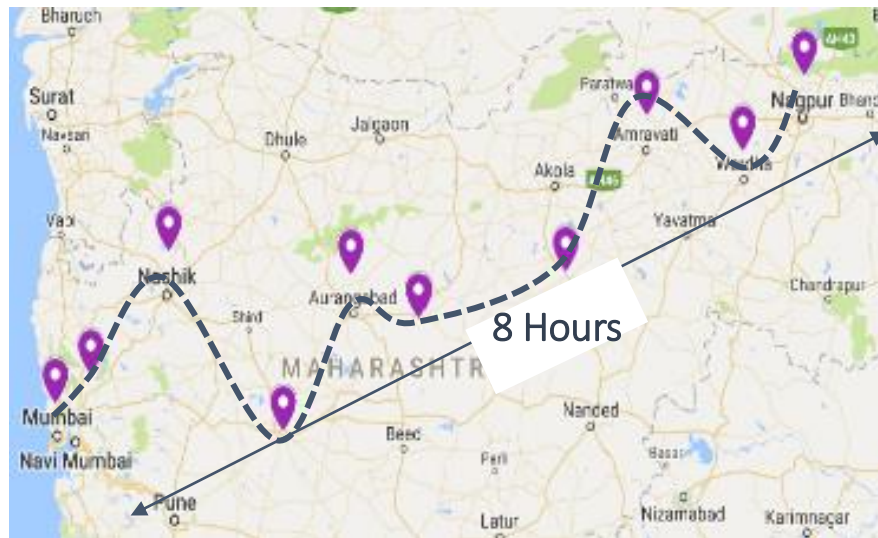


- Few hospitals like Alexis hospital, Seven Star hospital, Kingsway Hospital HCG Hospital, Sancheti hospital will commission in next couple of years.

5. For large hospitals, around 60% of the business contribution comes from credit patients, of which government schemes like CGHS, RGJAY, central railway scheme, etc. contribute c. 40%; private insurance and TPA business is in a nascent stage.

6. Thane has good connectivity through road and railway.

- Upcoming 800-km expressway between Mumbai and Nagpur. Total cost of the project is INR 300 bn, completion expected by 2019
- It will cut the travel time between Mumbai and Nagpur to 8 hours from the existing hours.



7. The futuristic project of Multi Modal International Hub Airport at Nagpur (MIHAN) will develop Nagpur as the cargo hub of India and the airport will have flights connecting to a number of prominent international destinations as well.

- **MIHAN** is one of a kind vision that will set the parading for futuristic urban development. A model that will successively sustain industrial commercial and residential growth within an environmental balance with the total estimated cost of **INR 3,000 Million.**

- As a part of MIHAN Project, it is planned to expand/upgrade the existing airport as International Passenger & Cargo Hub. The project is spread over on above 4300 Ha.
- The proposed hub Airport will help Nagpur to emerge as a leading international tourist gateway for India
- The potential for creating an international hub airport at Nagpur can be gauged from the fact that there is hardly any Hub Airport in a 5-hour fly-zone from India (i.e. between Dubai and Singapore).



8. Present Connectivity of Nagpur Airport

- Nagpur is well connected by daily direct flights to Mumbai, Delhi, Kolkata, Bangalore, Pune, Indore, Raipur and Hyderabad
- Air Arabia operates a 4 times a week to and fro flight between Nagpur and Sharjah and Qatar Airways operates a direct flight to Doha.



9. Commercial development has led to growth of residential projects in MIHAN; these two factors combined render MIHAN as one of the fastest growing zones in Nagpur city

- With a good number of companies setting up shop in MIHAN and the growing number of employees, there is a growing demand of residential spaces in the same area as well
- 5000 flats are proposed to be constructed in MIHAN, of which 1500 flats are ready as of now
- Realty major Mahindra Lifespaces has come up with Mahindra Bloomdale, a premium housing facility in MIHAN. The facility is spread across 25 acres of landscape and offering flats from 1 to 4BHK
- Moraj group has started building Moraj Waterfall Gateway, a well planned residential township in an area of 8 acres.
- International real estate firm Arcon is also planning a township in MIHAN SEZ.

Moraj Waterfall Gateway



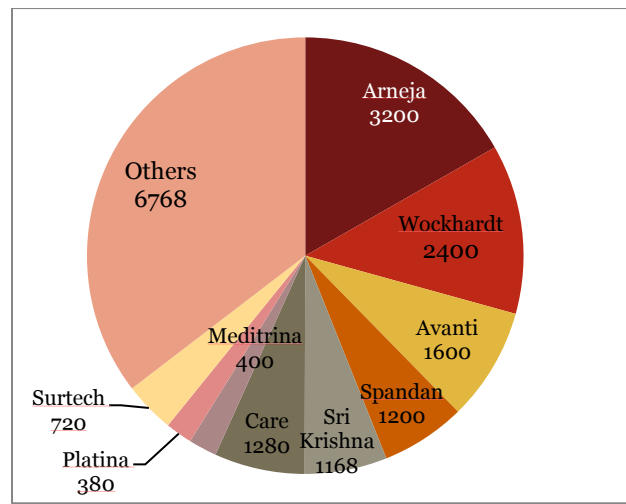
Mahindra Bloomdale



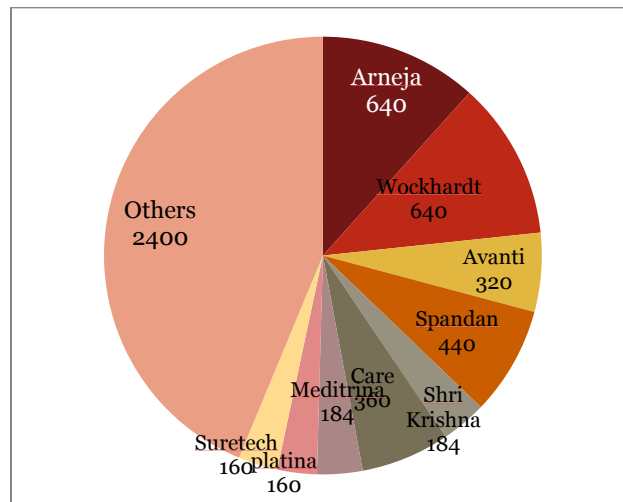
Procedure: 1

1. With an annual growth rate of 10%, ~5,488 PTCA procedures are carried out in Nagpur annually; Arneja Hospital is the leader with 13% market share followed by Wockhardt Hospital having 10% share

- **CAG volumes – c. 19,116 p.a.**



- **PTCA volumes – c. 5,488 p.a.**



2. Interventional cardiology market in Nagpur

- There are c.20 Cath labs in the city; one in public and rest in private set up.
- 4 to 5 new Cath labs are expected to be installed in Nagpur
- Average bill to patient undergoing CAG and PTCA (in twin sharing)
- CAG INR 7,000 to 10,000
- PTCA INR 80,000 to 1,00,000 (without stent)
- Mark up for higher class of accommodation would be around 10-15%
- Post the NPPA notification on capping of cardiac stent prices, Wockhardt increased its package price by INR 40-45,000.

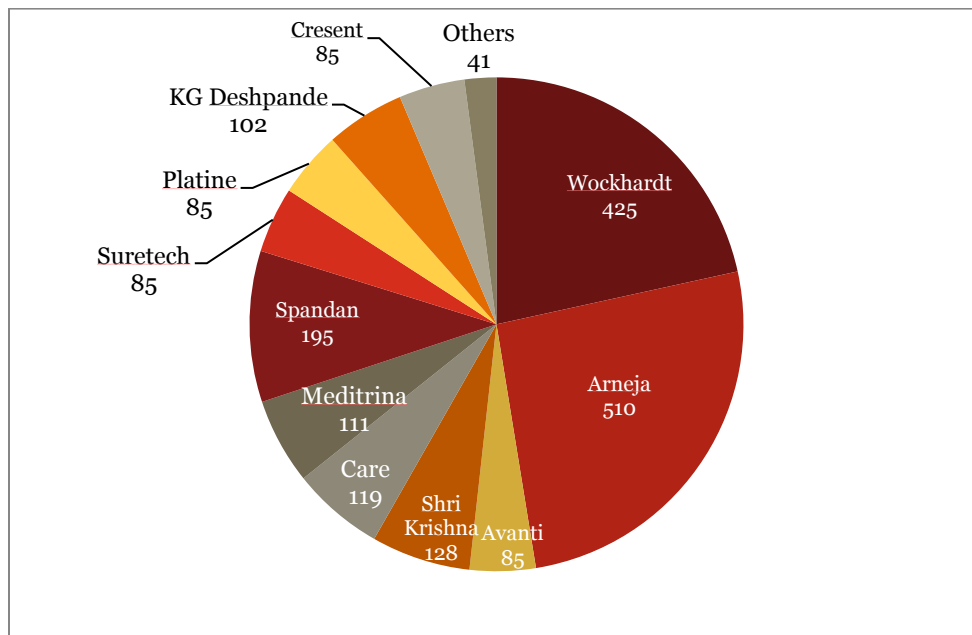
3. Package prices (in INR) for PTCA excluding stent at the leading hospitals in Nagpur

Hospital	Pricing in twin sharing
Arneja	99,000
Avanti	94,500
Wockhardt	1,66,500

Procedure: 2

- 1,971 CABG's are performed in Nagpur annually; Wockhardt Hospital is a market leader with 18% market share.**

- Player wise volumes of CABG surgeries in Nagpur**



2. Cardiac Surgery market in Nagpur

- Nagpur does around 3,600 cardiac surgeries annually. Growth for cardiac surgical cases has been stagnant over the past 2-3 years
- Of all the cardiac cases, majority are CABG
- CABG 75%
- Others 25% (valves and other cardiac procedures)
- There are around 10 Cardiac surgeons in Nagpur having active practice
- Patients from Vidarbha, southern part of Madhya Pradesh, Chhattisgarh drain into Nagpur. The drain has decreased by 5-10% over the last few years due to centres coming up in other cities and peripheral areas
- Average bill to patient undergoing for CABG in twin sharing is around INR 2,00,000
- Surgeon pay-out for cardiac surgeries is 30% of the package price

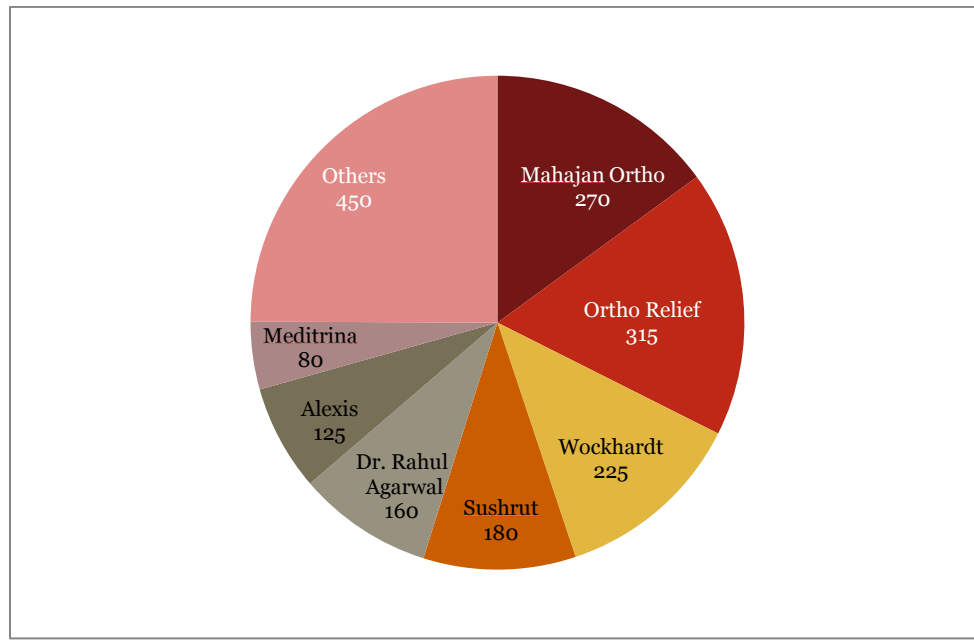
3. Package prices (in INR) for CABG at the leading hospitals in Nagpur

Hospital	Pricing in twin sharing
Arneja	1,70,000
Avanti	1,61,500
Wockhardt	2,21,000

Procedure: 3

1. Joint surgery market is growing at c. 15% annually with ~1800 cases; around 40% of the joints replacement volumes constitute of THR's.

- Player wise volumes of Joint Replacement surgeries p.a.



2. Joint Replacement market in Nagpur

- Around 1,800 Joint Replacements are done in Nagpur annually, with around 35% performed by A Ortho and Ortho Relief Centre
- Yavatmal and Akola in Vidarbha combined together does around 200-240 joints annually
- The joint replacement market is expected to grow at 15% y-o-y
- There are ~35 orthopaedic surgeons who perform joint replacement surgeries in the city; only 3 to 4 are dedicated joint replacement surgeons

- Mahajan Ortho, Ortho Relief, Wockhardt and Sushrut are the leading hospitals for joint replacement procedures.
- Average price point for unilateral TKR without implant in a twin sharing room is INR 1,20,000 to 1,50,000
- Pay-out for consultants is 20-30% of the package excluding the implant cost.

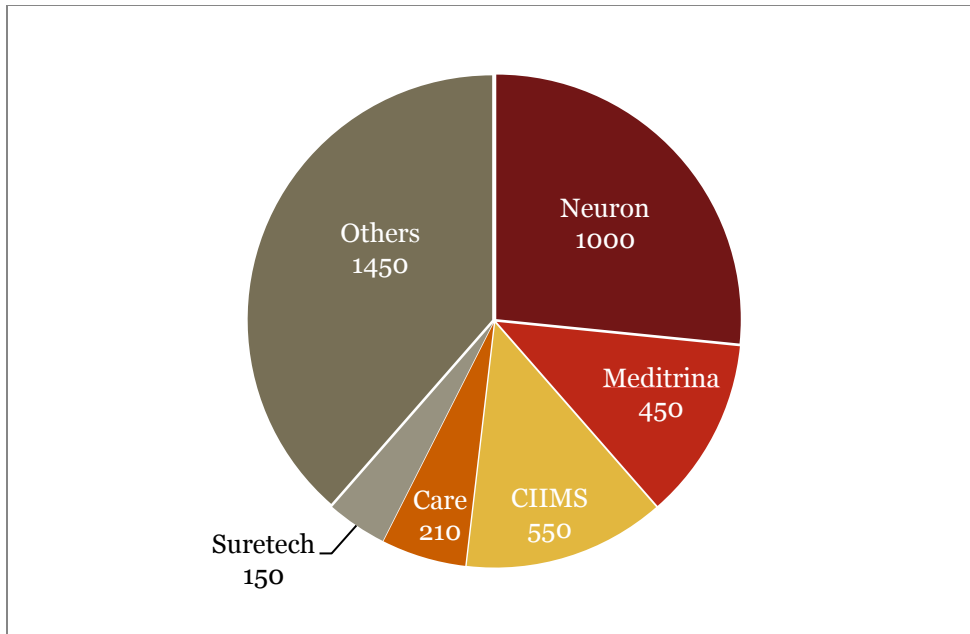
3. Package prices (in INR) for TKR without implant at the leading hospitals in Nagpur

Hospital	Pricing in twin sharing
Ortho Relief	90,000 to 1,05,000
Care	1,05,000 to 1,17,000
Wockhardt	1,10,000 to 1,40,000

Procedure: 4

- 1. Nagpur does ~4,800 neuro surgeries annually, with the market leader Neuron hospital performing 100-120 surgeries every month**

- **Player wise volumes of Neurosurgeries in Nagpur p.a.**



2. Neurosurgery market in Nagpur

- There are around 22 qualified neurosurgeons in the city, of which 20 have active practice
- Trauma constitutes 70% of the neurosurgery cases in Nagpur, rest 30% being elective
- Of all the neurosurgical procedures, split between brain and spine is estimated to be in a ratio of 6:4 in the city
- Total ~15 neurosurgeries are carried out every day in Nagpur
- Standard package price for a neuro procedure such as Brain Tumour is 1,26,000 to 1,80,000 INR in a twin sharing room.
- Package price increases at 10% when the room category changes
- Typical pay-out for a neurosurgeon is 30-35% of the package price for any procedure.

3. Price range for Neurosurgery procedures at leading hospitals in Nagpur

Procedure	Pricing in twin sharing
Brain Tumour	1,26,000 to 1,80,000 INR
Laminectomy	45,000 to 80,000 INR

- Wockhardt Hospital is the market leader in Nagpur both in terms of level of care and pricing.

Conclusion

- High drainage into Nagpur from peripheral areas, dearth of quality healthcare infrastructure and providers are some of the major factors which propels need for developing better healthcare facilities
 1. ***High drainage and dependency of patients***
 - Being the largest city and most developed from a healthcare infrastructure perspective in Central India, patients from Vidarbha, South MP and Chhattisgarh are dependent on Nagpur for healthcare treatments
 - Around 50% of the patient base in Nagpur hospitals is from outside Nagpur
 - ***Dearth of quality care institutions***
 - Besides Wockhardt, Alexis and 2-3 new projects, hospitals in Nagpur lacks infrastructure to provide multispecialty care under one roof
 - Ambience and look & feel wise also majority of the facilities would not get classified in the corporate hospitals set up style.

2. *Development of city's infrastructure*

- Connectivity perspective, Nagpur is well connected to all the major cities
- MIHAN SEZ is set to give an image makeover to the cities' infrastructure
- Given central location, Nagpur is set to become central India's hub for warehousing, manufacturing units, logistic park, it parks, etc.
- GST is expected to further aid this transition.

3. *Growing affluent class*

- Nagpur has the second highest per capita income of ~0.26 INR Mn when compared to tier 2 non-metro cities with population more than 2 Mn
- The city is estimated to have an affluent population of ~48% in 2016-17

Recommendations

• Infrastructure

- State of the art technology
- ~200 quality of beds.

• Quality Care

- The hospital is providing more specialized and highly unusual care in comparison with the other market players

- **Service**

- It is a multispecialty hospital with all facilities under one roof.
- The underserved healthcare services will be served .

- **Additional Benefits**

- Teaching institution for nurses and paramedical students.
- Teaching institutions for nurses and paramedical.

- **Location**

- Nagpur is one of the best place because of its geographical location.
- The hospital is coming up in a good growing residential area in Nagpur.

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Thank You