

## **Executive Summary**

Indian health care industry is going through an impressive transition over the last few years. With the economy booming, globalization is impacting every possible sphere of human life and health care is not aloof from this. The number of new and modern health care facilities established in the last decade in the country are far more than the similar establishments even in the first fifty years after independence.

Jaypee Associates under the stewardship of Shri J.P.Gaur has been contributing to building up the new and modern India through their massive projects in power , hospitality , infrastructure and education. The group has now decided to contribute with the similar zeal to the health care too. The maiden venture being planned is Jaypee Institute of Medical Sciences at Sector 128 Noida.

Astron Hospital and Health Care Consultants are honored and privileged to be associated with this prestigious project. The initial task undertaken by Team ASTRON has been to conduct a market survey which should form a basis of clinical and business plan for the proposed hospital. To ensure capturing of adequate information and data,the market survey was devised in an innovative manner. The typical market survey characterized by Primary and secondary data collection from the catchments area was augmented by getting valued inputs through a structured questionnaire from different stakeholders ; Doctors, Hospital administrators, Community including some of the prospective residents of the area and patients and their attendants who have undertaken treatment in the existing hospitals.

The purpose of the whole exercise has been to capture realistic analysis as it is a known fact that many studies based only on primary and secondary data do fail to provide optimum information and thus even lead to inadequate project planning.

For the purpose of the study the primary catchments area included Noida , Graeter Noida, adjoining habitations depending on facilities in Noida such as Mayur Vihar (Phase I,II,III),Anand Vihar,Okhla, Kalindi Kunj, Kakarduma and portions of South and East Delhi. The secondary catchments' area included the rest of Delhi, and prime areas of NCR such as Faridabad and Gurgaon which may directly or indirectly feed some clients to the hospital . The tertiary catchments areas were identified as portions of Haryana, UP and Rajasthan keeping in view the expansion of the NCR area of Delhi into consideration.

Further prioritization was done in these areas and selection of facilities for survey was done accordingly. While 100% of facilities in the primary catchments area were studied in the survey, 20% in the secondary and 10% in tertiary areas. Districts within UP and the districts around Noida and Greater Noida were given priority and 100% of Health care facilities were taken under the survey. While the districts not in close proximity and the line of access were taken up selectively in a graded manner, the total number of facilities /subjects surveyed / interviewed were as follows :

Catchments area	No of facilities / clients covered
Primary Catchments area	47 ( MA* – 47, Doctors – 42, Client exit – 116, CP** - 33
Secondary Catchments area	45 ( MA – 45, Doctors – 45, Client exit – 152, CP - 33
Tertiary catchments area	50( MA – 50, Doctors – 50, Client exit – 137, CP – 55)

(\*MA- Medical Administrators,\*\* Community perspective)

In total 805 interviews were conducted with different stakeholders and their responses were codified , entered into SPSS software and analysed to arrive at conclusions. The analysis of Primary and secondary data and the information and feed back from different stakeholders brought out the following conclusions:

❖ The hospital is ideally located in a futuristic environment where the access from fast upcoming localities of NOIDA, Greater Noida and many parts of South and East Delhi. Strategically located in the Taj express way the hospital can become destination of choice for towns located around this axis.

❖ A 500 bed facility at this location appears very justifiable. Intensive development is occurring in the Primary catchments area which can impact the growth of population in Noida and Greater Noida. Currently Noida and Greater Noida has a population of 5,40,000(Source: UP Jal Nigam ,2001) and there are 2792 existing beds (Astron survey).The projected population of Noida and Greater Noida will be 5,72,400 by 2011 assuming a growth rate of 6% - an increase of 32400 persons) . Based on this calculation the projected requirement of beds in the area by 2011 will be 4007 beds ( $7/1000 \times 572000$ ) . This will leave a clear gap of 1515 beds in the area. The hospital thus with 500 beds will be able to significantly fulfill this requirement. .

❖ The study of disease burden shows that the hospital should be designed to provide high end secondary care services from all basic specialties in a multi-specialty environment.

❖ In addition the hospital needs to cater to niche super specialties in a tertiary care environment. The selection of the specialties based upon the disease burden grading (information collected from secondary data, Hospital Administrators and Doctors).

❖ The niche facilities identified are as follows :

- a) Trauma and Accident Services,Advanced Orthopaedics, Cardiology and Cardio Thoracic Surgery, Oncology –Radiation, Surgical, Medical including Bone Marrow Transplant(BMT)
- b) Life style related diseases, Endocrinology, Diabetology and Rheumatology
- c) Respiratory diseases and Sleep labs
- d) Neurology,Nephrology and Andrology
- e) Gastroenterology, minimal invasive surgery
- f) Plastic and cosmetic surgery and dermatology
- g) Oral Health and Dental surgery

❖ The newer towns of Noida, Greater Noida and related complexes in East and South Delhi have a lot of population of young educated couples who have made these areas their homes due to influx of multinationals, BPOs and call centers located in proximity. These young executives with good paying capabilities have significantly different kind of health care needs. These apparently healthy individuals and couples , leading a stressed and stretched lifestyle, will look for following facilities:

- a) Wellness centers, Comprehensive Executive Health Checkup programs, and Advanced Centers for Mother and Child Health which should include Birthing suites, Assisted Reproduction (IVF) etc; Mother and Baby Wellness Centers, prenatal, antenatal and postnatal counseling, exercise center and facilities for fetal and neonatal medicine
- b) This age group being very conscious of their physical appearance and grooming will look forward to a center for aesthetic and cosmetic correction. It will be advisable to start a one stop center providing comprehensive services of dermatologists, cosmetologists, plastic surgeons, dental surgeons and related specialists in a specially designed center for the services.

❖ Another major group moving into these new residential complexes are people retired / retiring from active services. Though most of the diseases associated with ageing process have already been included in the clinical programme, still a geriatric care center located in the hospital can have its own impact on the popularity of the setup

❖ The integration of alternate systems of medicine into the mainstream treatment methodology is becoming the order of the day. Therefore the center of holistic medicine should be an integral part of the organization.

❖ All the above settings have to be very strongly supported by a specialized and advanced department of Anesthesiology and critical care.

❖ The laboratory is the heart and soul of the hospital. It is desirable to have a high-tech laboratory with facilities ranging basic diagnostics to immuno-pathology and molecular biology.

❖ Similarly Radiology and imaging augment the diagnostics base in a major way. The hospital programme should include all major imaging modalities to ensure that all facilities could be provided under one roof.

- ❖ Similarly the Blood Bank and Transfusion medicine set up will not only help the organization but will meet the unmet demand of the community.
- ❖ A strong support in the form of physiotherapy, rehabilitation, occupational therapy, and vocation therapy and neuro- rehabilitation would be required to complete the medical menu.

The clinical programme as briefed above will be subjected to an evidence based sizing process and then converted into a business plan which could address the philosophy and passion of the promoters. The business plan will aim to provide a world class facility with national and international accreditations.

The plan will also attempt to provide clinical services at par with international bench marks in order to attract a large section of medical tourist who chose India as their destination. The plan will address to create highest levels of service delivery in most congenial and aesthetically soothing environment both within and around the hospital.

The programme will also address to the Japye Institute of Medical Sciences to be designed as an Academic Medical Institution providing post graduate training (DNB) in select disciplines, nursing training and training of paramedical in the fields of Laboratory Technology, X-ray Technology, Operation Theatre Technology etc.

The expertise developed at Jaypee Institute of Medical Sciences will be put through virtual expansion for the benefit of the community through its linkages with satellite centers within India and high end centers abroad though facilities of telemedicine, telepathology and tele-radiology etc.

Based on the strong passion and commitment of the promoters and the findings of market survey and inputs from various stakeholders it is recommended that the clinical programme as proposed above should constitute the basis for developing a Medical Institute worthy of its eminence in the contemporary and futuristic health care scenario.