Chapter 3

Medical Tourism in Maharashtra

3.1 Maharashtra an Introduction

3.1.1 Maharashtra Infrastructure

3.1.2 Industries in Maharashtra

3.2 Maharashtra Tourism Market

3.2.1 Foreign Tourist Arrivals in Maharashtra

3.3 Maharashtra Healthcare Infrastructure

3.3.1 Healthcare delivery system in Maharashtra

3.3.2 Healthcare Initiatives of Maharashtra

3.3.3 Medical Tourism in Maharashtra
Chapter 3  Medical Tourism in Maharashtra

3.1  Maharashtra an Introduction

Maharashtra is the third largest State of India, both in area and population. Maharashtra abounds in numerous tourist attractions ranging from ancient cave temples, unspoiled beaches, ancient forts and monuments, forests and wildlife, unique hill stations, pilgrimage centres, and a rich tradition of festivals, art and culture. Now in the period of globalization Maharashtra is also ahead in health care. Maharashtra is definitely a scenic state, its beauty enriched by its long coastline. As such, western Maharashtra, and in particular the Konkan region, have turned into the most popular destinations.

3.1.1  Maharashtra Infrastructure

Maharashtra state has a well-developed social, physical and industrial infrastructure. It has good road, rail, and port and air connectivity. Apart from three international and five domestic airports, the state has two major and 53 minor ports. It also has a well-developed power supply grid. Maharashtra witnessed significant growth in the infrastructure sector in the last decade. There has been a considerable increase in the number of industrial clusters, and public private partnership projects in the infrastructure domain. Maharashtra ranks first amongst all the Indian states in terms of GSDP.

The state is well connected to its six neighboring states and other parts of India through 18 National Highways. The 93 km long Mumbai-Pune expressway is India's first six-lane, concrete, high-speed, tolled expressway which connects the state capital and financial hub, Mumbai with neighboring industrial hub, Pune. As of March 2011, 97.8 per cent of the villages in the state were connected by all-weather roads. Maharashtra State Road Transport Corporation (MSRTC) has been providing passenger road transport service in the public sector, since 1948. The state had a total road length of 410,521 km, as of March 2011. The state had a road density of 133.41 km per 100 sq km of area, as of March 2011.

---

Mumbai Metropolitan Region Development Authority (MMRDA) has undertaken mono rail, metro rail projects in Mumbai, which are at various stages of development. The rail transport system of Maharashtra is very well-developed. The state is well-connected to other parts of the country with a railway network spanning 5,984 km (including 382 km of Konkan Railway).

The Central Railways and the Western Railways, two of the zones of the Indian Railways, have their headquarters in Mumbai, at the Chhatrapati Shivaji Terminus and Churchgate respectively. Maharashtra also has an intra-city/sub-urban network of railways. The suburban railways carry around 6.94 million passengers every day².

There are three international and five domestic airports in Maharashtra. International flights operate from the Chhatrapati Shivaji International Airport in Mumbai, Mohegan Airport in Pune and Dr Ambedkar International Airport in Nagpur. Maharashtra Airport Development Company Limited is developing airports in Maharashtra including Solapur, Shirdi, Gadchiroli, Chandrapur, Amravati, Jalgaon and new international airport at Raigurunagar (Navin Chakan, District Pune). Mumbai Airport is one of the busiest airports in India. In order to reduce congestion in Mumbai International Airport, an additional airport has been proposed at Navi Mumbai.

3.1.2 Industries in Maharashtra

The Maharashtra Small Scale Industries Development Corporation Ltd. (MSSIDC), was established in 1962 to give a new orientation and strength to the development of small scale industries in the state. The main objective of MSSIDC is to aid, counsel, assist, finance, protect and promote the interests of small industries. Maharashtra Industrial Development Corporation (MIDC) is primarily responsible for the development of industrial infrastructure in the state. Maharashtra Agro Industries Development Corporation (MAIDC), founded in 1965, is responsible for development of agro-based units in the state. The Government of Maharashtra is promoting the development of several Special Economic Zones (SEZs) across Maharashtra for sectors such as IT/ITeS, pharmaceuticals, biotechnology, textile, automotive & auto-components, gems &
jewellery and food processing. Maharashtra has attracted highest number of industrial investment proposals among Indian states (17,207 proposals between August 1991 and October 2011). The state’s share in proposed investment and employment in the country is 9.4 and 19.6 per cent, respectively.

Government of India is establishing the Dedicated Freight Corridor between Delhi and Mumbai, covering an overall length of 1483km and passing through the States of U.P, NCR of Delhi, Haryana, Rajasthan, Gujarat and Maharashtra, with end terminals at Dadri in the National Capital Region of Delhi and Jawaharlal Nehru Port near Mumbai. This Dedicated Freight Corridor offers high-speed connectivity for High Axle Load Wagons (25 Tonnes) of Double Stacked Container Trains supported by high power locomotives. The Delhi-Mumbai leg of the Golden Quadrilateral National Highway also runs almost parallel to the Freight Corridor. DMIC aims to promote integrated development of industry and infrastructure in a band of 150 km to 200km (Influence region). The DMIC region will be developed as a ‘Global Trading and Manufacturing Hub’. Government of India has incorporated a special purpose vehicle, Delhi Mumbai Industrial Corridor Development Corporation (DMICDC), specially envisaged to coordinate DMIC Project Development, Finance and Implementation

DMIC Footprints in Maharashtra

- 29% geographical area of Maharashtra catering to 26% population. 17% of DMIC Project Influence Area (PIA) is in Maharashtra
- Major Districts covered : Thane, Nasik, Pune, Aurangabad, Ahmednagar, Dhule, Nandurbar & Raigad
- Maharashtra is envisioned as a new sustainable global industrial region, a network of interconnected, modern cities providing place for people to live, work, play, and celebrate life in a safe, healthy environment
- DMIC Is likely to increase Industrial output of Maharashtra, by an additional Rs. 20,00,000 Crore over next three decades
3.2 Maharashtra Tourism Market

Maharashtra has a wealth of tourist attractions ranging from forts, tribal arts, caves, hill stations, beaches, water sports, entertainment and film industry, cultural activities, pilgrimage centers, wildlife sanctuaries, intense trade and commercial activities, shopping malls, plazas and much more making it a complete tourist destination. Mumbai is one of the most important place in Maharashtra to visit. The state ranked first in foreign tourists arrivals and among top 5 states in domestic tourist arrivals. The services sector is the largest sector in the state and it has been growing at the rate of 8.5 per cent from 2001 to 2007. Within the services sector, the trade, hotels and restaurants have the highest contribution to the total state income (Bhandari L. and Kale S, 2009).

Table: 3.1 Foreign and Domestic Tourist Arrivals in Maharashtra

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>14329667</td>
</tr>
<tr>
<td>2006</td>
<td>16880348</td>
</tr>
<tr>
<td>2007</td>
<td>19226716</td>
</tr>
<tr>
<td>2008</td>
<td>20553360</td>
</tr>
<tr>
<td>2009</td>
<td>30628394</td>
</tr>
<tr>
<td>2010</td>
<td>48465492</td>
</tr>
<tr>
<td>2011</td>
<td>55333467</td>
</tr>
<tr>
<td>2012</td>
<td>66330229</td>
</tr>
</tbody>
</table>

3.2.1 Foreign Tourist Arrivals in Maharashtra

Maharashtra topped the list in number of foreign tourist visits, followed by Tamil Nadu and New Delhi. While Maharashtra received nearly 4.8 million tourists, Tamil Nadu welcomed 3.4 million people and New Delhi played host to 2.2 million foreigners, according to the latest report from the Union Ministry of Tourism. The statistics released by the Ministry for 2011, says the number of Foreign Tourist Visits (FTVs) to Indian states/union territories was 19.5 million as compared to 17.9 million in 2010 and 14.4 million in 2009. This year, the number of FTVs registered a growth of 8.85 percent over 2010 as compared to a growth of 24.6 percent.
in 2010 over 2009. It is the third consecutive year where the number of foreign tourist visitors has increased.

The number of domestic and foreign tourist visits to different States/UTs during the years 2011 and 2012. It may be seen from this Table that most of the States/UTs have generally observed increase in the number of domestic and foreign tourist visits, during 2012 Maharashtra have been estimated using all India growth rate.

### Table 3.2 Domestic and Foreign Tourist Growth in Maharashtra

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Maharashtra</td>
<td>55333467</td>
<td>4815421</td>
<td>66330229</td>
<td>5120287</td>
<td>6.33</td>
</tr>
</tbody>
</table>

*Source: India Tourism Statistics 2012*

The top 5 States in domestic tourist visits in 2012 were Andhra Pradesh (206.8 million), Tamil Nadu (184.1 million), Uttar Pradesh (168.4), Karnataka (94.1 million) and **Maharashtra (66.3 million)** with their respective shares being 20%, 17.8%, 16.2%, 9.1% and 6.4%. These 5 States accounted for about 69.5% of the total domestic tourist visits in the country. In respect of foreign tourist visits in 2012, the top 5 States/UTs were Maharashtra (5.1 million), Tamil Nadu (3.6 million), Delhi (2.3 million), Uttar Pradesh (2.0 million) and Rajasthan (1.5 million) with their respective shares being 24.7%, 17.2%, 11.3%, 9.6% and 7.0% These 5 States/UTs accounted for about 69.8% of the total foreign tourist visits to the States/UTs in the country.
The top 10 States/UTs in terms of foreign tourist visits during 2012 were mostly the same as in 2011, with marginal changes in relative ranks of States. The following graph shows the percentage share of top 10 States/UTs in terms of foreign Tourist visits in 2012.

Source: India Tourism Statistics 2012
3.3 Maharashtra Healthcare Infrastructure

Maharashtra state has a three-tier public health infrastructure, comprising Hospitals, Primary Health Centers and Health Units, Community Health Centres and Subcentres. As of 2010, the number of beds in various public and government-aided health institutions in the state were 115,704; the state had 102 beds per 100,000 of population. As of October 2011, the state had 498 State level Hospitals, 23 District Hospitals, 83 Sub District Hospitals, 458 Community Health Centres, 1,809 Primary Health Centres and 10,580 Sub Centres.

Table 3.3 Healthcare Infrastructure in Maharashtra

<table>
<thead>
<tr>
<th>Healthcare Infrastructure</th>
<th>Type of Institutions</th>
<th>No.</th>
<th>Type of Institutions</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Level Hospital</td>
<td>498</td>
<td></td>
<td>Sub Centres</td>
<td>10,580</td>
</tr>
<tr>
<td>District Hospital</td>
<td>23</td>
<td></td>
<td>Primary Health Units</td>
<td>172</td>
</tr>
<tr>
<td>Sub District Hospital with capacity of -50 beds</td>
<td>56</td>
<td></td>
<td>Mobile Health Units</td>
<td>61</td>
</tr>
<tr>
<td>Sub District Hospital with capacity of -100 beds</td>
<td>23</td>
<td></td>
<td>Women Hospitals</td>
<td>8</td>
</tr>
<tr>
<td>Sub District Hospital with capacity of -200 beds</td>
<td>3</td>
<td></td>
<td>Mental Hospitals</td>
<td>4</td>
</tr>
<tr>
<td>Rural Hospital / Cottage Hospital</td>
<td>386</td>
<td></td>
<td>Dental Hospitals</td>
<td>3</td>
</tr>
<tr>
<td>Primary Health Units</td>
<td>1816</td>
<td></td>
<td>TB Hospitals</td>
<td>5</td>
</tr>
<tr>
<td>Community Health Centres</td>
<td>458</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Planning Commission of India

Maharashtra has been in the forefront of healthcare development in the country. It was among the first states to decentralize primary healthcare administration through Zilla Parishads as early as 1961. Further, under the Minimum Needs Program Maharashtra was again one of the first states to achieve the norms mandated for primary health centers, subcentres, and Rural Hospitals. The state also has the largest private health sector in India whose reach is quite extensive. The Tertiary healthcare service in Maharashtra has witnessed an enormous growth in infrastructure in the private and voluntary sector. The private sector
which was very modest in the early stages has now become a flourishing industry equipped with most modern state-of-art technology at its disposal. It is estimated that 75-80% of healthcare services and investment in Maharashtra are now provided by the private sector such as the Tatas, Fortis, Max, Wockhardt, Parimal, Apollo and the Escorts group.

Table 3.4 Health Indicators of Maharashtra

<table>
<thead>
<tr>
<th>Health Indicators of Maharashtra</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Population Served per Government Hospital</td>
<td>82,264*</td>
</tr>
<tr>
<td>Birth Rate (per thousand persons)</td>
<td>16.7</td>
</tr>
<tr>
<td>Death Rate (per thousand persons)</td>
<td>6.3</td>
</tr>
<tr>
<td>Infant Mortality Rate (per thousand live births)</td>
<td>25</td>
</tr>
<tr>
<td>Life Expectancy at Birth (years )</td>
<td></td>
</tr>
<tr>
<td>Male (2002-2006)</td>
<td>66.0</td>
</tr>
<tr>
<td>Female (2002-2006)</td>
<td>68.4</td>
</tr>
</tbody>
</table>

*Source: India Brand Equity Foundation

3.3.1 Healthcare delivery system in Maharashtra

India has a universal health care system run by the local state or territorial governments. Maharashtra state and its hospitals is part of it. Most essential drugs are offered free of charge in these hospitals. However, the fact that the government sector is understaffed underfinanced and that these hospitals maintain very poor standards of hygiene this forces many people to visit private medical practitioners. The charges for basic in-hospital treatment and investigations are much less compared to the private sector. The cost for these subsidies comes from annual allocations from the central and state governments. Primary health care is provided by city and district hospitals and rural primary health centers (PHCs). These hospitals provide treatment free of cost. Primary care is focused on immunization, prevention of malnutrition, pregnancy, child birth, postnatal care, and treatment of common illnesses. Patients who receive specialized care or have complicated illnesses are referred to secondary (often located in district and taluka headquarters) and tertiary care hospitals (located in district and state headquarters or those that are teaching hospitals).

The Public Health Department Government of Maharashtra is making constant and concerted effort to formulate and execute schemes to ensure adequate health care services to the people in line with the National Health Policy. While implementing these schemes,
steps are being taken to make improvements in the health care system in the State to cater to the health needs of the people in the rural areas, particularly in the tribal and backward regions of the State. Maharashtra is one of the largest states in the country and is also among the best economically developed states.

It has one of the largest industrial economies in the country and is a primary financial center. Its economic dominance is in large part due to the contributions of Mumbai, the country’s financial and industrial capital that accounts for 35 per cent of the state’s domestic product with only about 12 per cent of the state’s population. Maharashtra is the second most populous state in India with a population of 96.8 million (2001 Census), investment in Maharashtra, and especially in Mumbai, has come from all over the country and the world. Mumbai and a few other industrial cities in Maharashtra have attracted the best human resources. All this has contributed to the present level of development of the state and the city.

Organizational Structure of Public Health

The overall organisational structure and systems of public health care provision are not very different across the country. Even though health is a state subject most states follow a similar pattern of health care administration and management.

Fig 3.3 Organizational structure of Public Health
3.3.2 Healthcare Initiatives of Maharashtra

Maharashtra has been in the forefront of healthcare development in the country. It was among the first states to decentralize primary healthcare administration through Zilla Parishadas as early as 1961. Further, under the Minimum Needs Program Maharashtra was again one of the first states to achieve the norms mandated for primary health centres, subcentres and Rural Hospitals. The state also has the largest private health sector in India whose reach is quite extensive. While Maharashtra is today also the most affluent state in the country with the highest per capita income here are some Healthcare Initiatives taken and some of taking by Maharashtra last five years.

✓ Kumar Urban development (KUL) has signed an agreement with super specialty Nova Hospital for a build-to-suit (BTS) project in Pune, Maharashtra. With this project, Nova brings super specialities such as high end surgeries to the city of Pune.

✓ Fortis Hospital Mulund, has launched ‘Fortis Child Heart Mission’ to provide heart surgeries and treatment at an affordable cost. Since the start of initiative in January 2013, reportedly more than 150 children with heart defects have already been treated successfully at the Fortis.

✓ Health city Project in Nagpur, The Health City is spread over 40 Hectares of land within the SEZ. It will consist of a chain of Super Specialty Hospitals accommodating about 2000 beds catering to various multi-specialty treatments. The Health city will consist of various support facilities like Common Diagnostic Centre, Common Waste Disposal Facilities, Economy and Luxury Class accommodation for relatives or companions of patients admitted, Training Institute for Nurses and Technicians.

✓ Maharashtra and the national capital region (NCR) accounted for over 50% of foreign direct investment inflows into the country during the first half of 2010-11, says the latest industry ministry data. Maharashtra attracted the maximum foreign direct investment (FDI) of about $2.67 billion (Rs 12,275 crore) during April-September, 2010, accounting for 34% of the total FDI in the country during the period. National
capital region (NCR), including parts of Uttar Pradesh and Haryana, received $1.96 billion (₹8,961 crore) of FDI during the period.

✓ The Government of Maharashtra has entered into a partnership with GE Healthcare for setting up advanced diagnostic and imaging facilities in 22 hospitals. A consortium of Wipro GE Healthcare will run these 24/7 diagnostic facilities. The partnership in which GE will act as the technology partner and Ensocare as the operating partner aims at bringing technology at an affordable price point for the people of the state. GE has invested around Rs 150 crore in this project.

✓ Government of Maharashtra and Government of Quebec are trying to explore opportunities for collaboration and one of them is the signing of the Joint Declaration on Cooperation in Health and Social Services in telemedicine. Tele-trauma and Primary care.

✓ The Maharashtra Government has set up an International Biotech Park, at Hinjewadi, 10 km from Pune city. This is the first public-private biotechnology park initiative in the state.

✓ Chief minister of Maharashtra has announce the state government has prepared a master plan of setting up 1,500 new primary health centres, sub-centres and small hospitals so that affordable medical service is available in every corner of the state.3

3.3.3 Medical Tourism in Maharashtra

In the period of globalization Maharashtra is also ahead in health care, Maharashtra has the best qualified professionals in each & every field and this fact has now been realized the world over regarding medical facilities. Maharashtra has the most competent Doctors and world class medical facilities with most competitive charges for treatment of certain Medical problems. After carving a niche for itself on the global tourism map, Maharashtra is now looking for creating a new identity by offering best health services to tourist.

Undoubtedly a lot in the recent days and experts are comparing it as one of the best emerging medical tourism destination. After Delhi, Bangalore, Chennai and Kerala, Maharashtra has better scope in medical tourism in the coming decade, be it a Unani, Ayurveda, Homeopathy, Allopathic medicines, local doctors are second to none, medical experts claim. On the cost front too, Maharashtra offers affordable treatment compared to other parts of India and foreign countries.

In Maharashtra Metropolitan cities like Mumbai & Pune, Medical Tourism is going on big way, with this there are other destinations of Maharashtra also have potential for Medical Tourism, and these are the sunshine city of Medical Tourism Destination in Maharashtra. i.e., Aurangabad, Nasik and Nagpur. Additionally, medical tourism overlaps with conventional tourism in the sense that patients and those who accompany him or her also take time off to visit various other tourist destinations within easy reach. For example, there have been cases when a person and his family members, post treatment in Mumbai, have taken time off to visit Pune, Aurangabad, Mahabaleshwar, etc. The spinoffs from medical tourism are therefore immensely profitable.

Like any other service industry, medical tourism too depends on maintaining very high standards and absolute professionalism. What works in favor of Medical Tourism destination at Maharashtra is that there is the availability of English-speaking paramedics and other staff in medicare institutions which puts visitors at ease. Additionally, visitors coming from abroad do not face too many visa complications. Meanwhile, over the years some of the bigger hospitals in Maharashtra have created a niche for themselves and now their brand identity is enough to attract people from across the world.