



HEALTH*aware*

Insights and perspectives on the future of healthcare

Edition 1
DIGITAL HEALTH

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PREFACE

Digital transformation is the engine driving the fastest and most extensive changes in healthcare delivery, access, and outcomes.

The inaugural edition of the newsletter discusses the ground realities of digital health uptake in India and around the world. We examine how digitalisation is making universal health coverage possible, improving the quality and accessibility of healthcare, and empowering health professionals and patients. Through an emphasis on interoperability, safe data transfer, and the integration of cutting-edge technologies, we outline how digital health platforms can facilitate smooth collaboration, streamline hospital operations, provide real-time insights for programme monitoring and supportive supervision, and help in creating tools for capacity building in various thematic areas of health.

As you delve into the insights and the perspectives in this issue, I encourage you to participate in the conversation and help define the future of digital health, which is open, secure, and guided by a shared vision of health for all.

LAV GOYAL

PARTNER & HEAD

BUSINESS ADVISORY SERVICES

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1

UNLOCKING POTENTIAL: The future of healthcare in the age of digital transformation



Over the last decade, digital transformation has radically changed public health systems worldwide, improving their efficacy, efficiency, and accessibility. WHO's [Global Digital Health Monitor](#), signals strong intent of countries toward digitizing healthcare systems. Most countries have placed **Universal Health Coverage (UHC)** at their core, aligning national Digital Health efforts with the broader vision of inclusive and equitable healthcare access¹. However, while strategic frameworks are in place, execution remains a key challenge.



Despite the momentum & intent, only **47% of these countries** have progressed to **Phase 3 or higher** of the Strategy and Investment Framework. One of the major barriers for Digital Health being lack of adequate funding, with 90% of these countries covering only half of their national needs, hindering the pace & scale of implementation.¹

Meanwhile, the private sector is advancing at a rapid pace, embracing market forces and pushing the boundaries of digital innovation in healthcare. To fully realize the potential of digital health, a concerted effort is required to close the gap between the ambitions of the public sector and the innovation of the private sector. Doing so requires a clear understanding of the key digital trends that are reshaping healthcare delivery across settings.

¹State of Digital Health. (2023). State of digital health 2023. Squarespace.

Digital Trends Reshaping Healthcare Delivery



Telemedicine and Remote Care:

Initially adopted as an emergency response during the pandemic, telemedicine has now become a fundamental element of modern healthcare delivery. Building on this momentum, India has seen the rise of E-clinics that are expanding access to primary care in rural areas through telemedicine. These efforts complement government initiatives like eSanjeevani and are further supported by private players.



AI and Predictive Analytics:

AI is making significant strides in diagnostics and preventive care. AI-powered tools are being used to **screen for breast, oral, and cervical cancers**, enabling earlier detection. Hospitals are leveraging historical data to forecast disease outbreaks and optimize resource allocation. This has proven useful in managing patient spikes during flu seasons thereby reducing ICU overcrowding.²



Wearables and IoMT:

The Internet of Medical Things (IoMT) is enabling **real-time monitoring and proactive management** of chronic diseases. As these devices become more affordable and accurate, they are poised to play an even greater role in enhancing preventive care, reducing hospital visits, and promoting personalized health management.



Health Information Exchange (HIE):

Singapore has **universally adopted** National Electronic Health Record (NEHR) system.³ It has the ability to **seamlessly share patient information across healthcare providers**.



Blockchain Implementation for Data Security:

Blockchain technology has emerged as a major tool offering enhanced security, transparency, and interoperability for secure, portable health records - a critical need in today's digital fragmented ecosystems.

Digital transformation in public health is no longer optional, it's imperative for building resilient, inclusive, and efficient health systems. Governments, healthcare providers, and technology partners must collaborate to harness technology's full potential while addressing ethical, equity, and security concerns.

²Gupta, R., & Sharma, A. (2023). Impact of digital health technologies on healthcare delivery: A review. International Journal of Research Publication and Reviews

³Fernandes, N. (2023, March 10). National Electronic Health Record (NEHR) expansion. LinkedIn.

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AI AT THE HELM: Shaping the future of diagnostics and healthcare delivery in india



From improving diagnostic precision to enhancing system efficiency, AI is emerging as the **central catalyst** for transforming India's healthcare ecosystem over the next five to ten years.⁴ With its ability to improve efficiency, accuracy, and personalisation, AI is poised to redefine how healthcare services are provided, making them more accessible and cost-effective.

By enabling more **accurate, faster, and data-driven diagnostics**, AI addresses three of India's most persistent healthcare **challenges**: accessibility, affordability, and quality. Through AI-integrated digital and remote diagnostics, medical evaluations are becoming faster, more scalable, and more accurate, bringing high-quality healthcare within reach for millions who were previously excluded.

AI-powered tools, ranging from machine learning algorithms to advanced deep learning models, are being integrated into clinical workflows to support real-time decision-making. These technologies can rapidly analyse complex datasets, such as imaging scans, lab results, and patient histories, to detect patterns, flag anomalies, and generate clinical insights that can assist professionals in making more informed and timely decisions.

Examples of this transformation are already visible. AI models such as **Google's ARDA**⁵ are showing early success in detecting diabetic retinopathy. At the same time, homegrown innovations like **Niramai's AI-based thermal imaging**⁶ are being used for early breast cancer detection in Indian healthcare settings. These tools are democratising diagnostics by lowering costs, reducing dependence on high-end infrastructure, and improving consistency in results.

AI systems can triage cases, prioritise critical patients, and even recommend potential diagnoses or treatment plans, amplifying the effectiveness of healthcare professionals. In domains like radiology and pathology, AI-driven image analysis reduces diagnostic turnaround times, enabling more consistent, accurate, and confident decision-making. The most effective use of AI lies in its seamless integration with existing healthcare **system features**. When combined with **electronic health records, telemedicine platforms, and remote monitoring tools**, AI can help create a holistic view of a patient's health. This integration allows providers to tailor care based on individual risk profiles, detect early warning signs of disease, and proactively manage chronic conditions, advancing India toward truly predictive and personalised healthcare.

The integration of AI into India's healthcare fabric is not just a technological advancement but a **strategic enabler** for system-wide transformation. AI can help health systems manage growing patient volumes, enhance the continuity of care, and reduce the urban-rural divide in access. It offers a unique opportunity to align with national goals, such as Universal Health Coverage (UHC), and strengthen resilience in the face of future public health challenges.

As India continues its digital health journey, stakeholders across the public and private sectors must view AI as a **core component of healthcare strategy**. Investments in AI should be accompanied by workforce training, infrastructure development, and robust data governance. Building trust through transparency, ensuring interoperability, and fostering inclusive innovation will enable AI to deliver on its promise.

In the years ahead, AI will not only assist in delivering healthcare but it will also help redefine how healthcare is **accessed, experienced, and managed**. The convergence of AI with digital diagnostics represents a pivotal step toward building a **more inclusive, intelligent, and resilient healthcare system**, where timely, high-quality care becomes the norm rather than the exception.

⁴Express Healthcare (2025). Digital diagnostics will transform India's healthcare in the next five to ten years.

⁵Google ARDA. AI Imaging and Diagnostics.

⁶Niramai. A Novel AI-based Breast Cancer Screening.

3

INTEROPERABILITY: The foundation of a secure and connected health ecosystem



In an age where healthcare innovation is built on collaboration and real-time data access, interoperability has become the linchpin of connected, patient-centred care. By enabling seamless data sharing, interoperability makes it possible for health systems to respond cohesively, regardless of the care environment's fragmentation. It is what truly powers electronic health records (EHRs), telehealth platforms, and Health Information Exchanges (HIEs).

Modern interoperability frameworks such as HL7 FHIR are revolutionising healthcare infrastructure.⁷ FHIR is now implemented by 70% of hospitals in the US, facilitating swift data exchange

through secure APIs, which meet the needs of bridging current systems and future digital platforms.⁸ In Europe, the National Interoperability Framework Observatory (NIFO) programme brings together 35 nations under the Interoperable Europe strategy, facilitating cross-border health collaboration and enhancing pandemic preparedness.⁹

HIEs are a tangible demonstration of the power of interoperability. CRISP, the regional HIE serving Maryland and D.C., sends real-time emergency department alerts that have lowered hospital readmissions.¹⁰

Tangible Benefits Across the Ecosystem



Clinical Excellence:

Connected systems provide clinicians with detailed medication histories, preventing as many as 28% of adverse drug events.¹¹



Operational Efficiency:

Standardised data exchange reduces administrative spending, eliminating an estimated USD 30bn in unnecessary expenses for the US healthcare system each year.¹²



Public Health Impact:

In response to COVID-19, interoperable systems in EU member states accelerated vaccine administration, demonstrating the role of interoperability in crisis response.

Difficulties such as outdated infrastructure and legacy data silos persist but can be overcome. Middleware and cloud-based APIs can upgrade current infrastructure without requiring complete system revamps. New technologies, such as blockchain (e.g., MedRec), provide decentralised, tamper-resistant health records that empower patients with control over their information while providing trust and transparency.¹³

⁷HL7 FHIR Foundation. (n.d.). Welcome to the HL7 FHIR Foundation. <https://fhir.org/>

⁸Office of the National Coordinator for Health Information Technology. (2023, September). Hospital use of APIs to enable data sharing between EHRs and apps (Data Brief No. 68). U.S. Department of Health and Human Services. <https://www.healthit.gov/data/data-briefs/hospital-use-apis-enable-data-sharing-between-ehrs-and-apps>

⁹Publications Office of the European Union. (2024, October 14). National Interoperability Framework Observatory: Empowering digital cooperation across Europe. <https://data.europa.eu/en/news-events/news/national-interoperability-framework-observatory-empowering-digital-cooperation>

¹⁰Chesapeake Regional Information System for our Patients (CRISP). (n.d.). CRISP Reporting Services (CRS). <https://www.crisphealth.org/learning-system/crisp/>

¹¹Ray, S. D., Beckett, R. D., Kisor, D. F., Gray, J. P., & Kiersma, M. E. (2015). ADRs, ADEs and SEDs: A bird's eye view. Side Effects of Drugs Annual, 37, xxvii-xxxvii. [https://doi.org/10.1016/S0378-6080\(15\)00061-6](https://doi.org/10.1016/S0378-6080(15)00061-6)

¹²Barth, S. (2024, June 19). Clinical interoperability in healthcare. ForeSee Medical. <https://www.foreseemed.com/blog/clinical-interoperability-in-healthcare>

¹³Ekblaw, A., Azaria, A., Halamka, J. D., & Lippman, A. (2016). MedRec: Blockchain for medical data access, permission management and trend analysis. MIT Media Lab. <https://www.media.mit.edu/publications/medrec-blockchain-for-medical-data-access-permission-management-and-trend-analysis/>

The path forward lies in integrating interoperability and sound security systems into every digital health product we build. A prime example of this strategy is Manifest MedEx, the state of California's HIE, which utilises FHIR APIs combined with AI-based Data Loss Prevention (DLP) solutions to exchange imaging and lab results safely between 10,000+ providers.¹⁴ The reward? A 40% reduction in diagnostic delays and a step change in the speed and safety of care delivery.¹⁵

Interoperability is not merely about connecting systems. It's about enabling clinicians, improving health outcomes, and unlocking the full potential of digital health. With secure data sharing combined with intelligent DLP architectures, healthcare organisations can lead the charge toward a safer, smarter, and more collaborative future.

SECURING THE FUTURE OF HEALTHCARE: The Power of DLP, Secure Health Information Exchange

With the rapid digitalisation of healthcare, the protection of sensitive health information has become both a regulatory mandate and a necessity for trust-building. Healthcare organisations are increasingly being pushed to secure patient data while facilitating the free flow and safe transfer of information to drive coordinated care. Data Loss Prevention (DLP) technologies and secure Health Information Exchange (HIE) processes are becoming twin pillars of digital health resilience.

DLP solutions take an active approach to detecting, monitoring, and safeguarding Protected Health Information (PHI) on various endpoints. Advanced data discovery and classification by DLP tools categorise PHI according to sensitivity and compliance requirements (e.g., the Health Insurance Portability and Accountability Act, the General Data Protection Regulation). With strong policy enforcement controls, such as granular access controls and encryption, DLP ensures that the right individuals have access to the correct information at the right time.

Augmenting DLP, secure HIE platforms facilitate data mobility between healthcare settings. By implementing interoperability standards like FHIR (Fast Healthcare Interoperability Resources), and DICOM (Digital Imaging and Communications in Medicine), and securing transactions through Secure Sockets Layer/Transport Layer Security (SSL/TLS) protocol and Advanced Encryption Standard (AES), HIEs establish a secure environment for cross-institutional collaboration.^{16,17} Audit trails ensure accountability and transparency, facilitating regulatory compliance and incident response.

The risks are high: the average healthcare data breach now costs USD 10.93mn.¹⁸ In addition to cost risk, broken trust and fragmented care can severely affect patient outcomes. By committing to combined DLP and HIE strategies, healthcare organisations are not only preventing costly breaches but also reducing redundant testing by improving efficiency and patient care.

Protecting health information is no longer an IT issue; it's a clinical and strategic imperative. To healthcare executives, the merging of DLP with secure HIE is not only about regulatory compliance; it's about creating a future-proof, patient-centred digital health ecosystem. Those that do it correctly will raise the bar on trust, innovation, and quality of care in the digital era.

¹⁴Manifest MedEx. (n.d.). Manifest MedEx. Retrieved May 5, 2025, from <https://www.manifestmedex.org/>

¹⁵Avaneer Health. (2023, September 5). Closing gaps in interoperability could improve healthcare outcomes. [https://avaneerhealth.com/blog/closing-gaps-in-interoperability-could-improve-healthcare-outcomes/contentReference\[oaicite:2\]\[index=2\]](https://avaneerhealth.com/blog/closing-gaps-in-interoperability-could-improve-healthcare-outcomes/contentReference[oaicite:2][index=2])

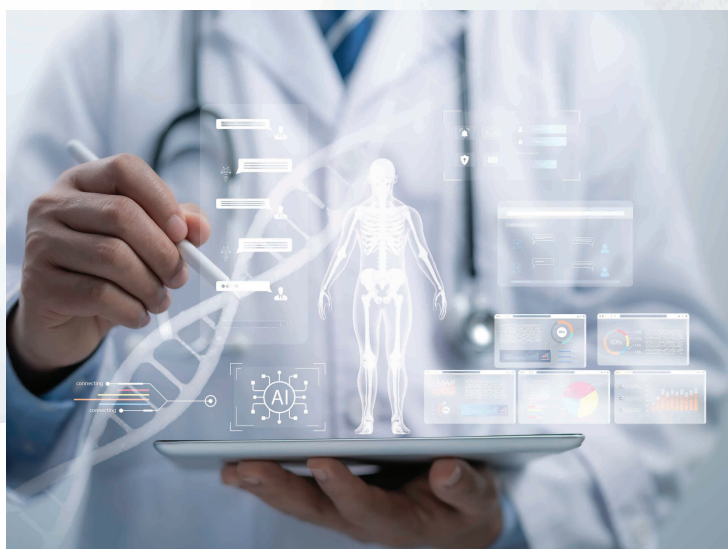
¹⁶Adler-Milstein, J., & Longhurst, C. (2019). Assessment of patient engagement with health information technology in a digital health system. *Journal of the American Medical Informatics Association*, 26(7), 578–580. <https://doi.org/10.1016/j.jamia.2019.03.010>

¹⁷Bidgood, W. D., Jr, Horii, S. C., Prior, F. W., & Van Syckle, D. E. (1997). Understanding and using DICOM, the data interchange standard for biomedical imaging. *Journal of the American Medical Informatics Association : JAMIA*, 4(3), 199–212. <https://doi.org/10.1136/jamia.1997.0040199>

¹⁸Mitnick Security. (2025, March 19). Why healthcare cybersecurity matters: 5 lessons from recent data breaches. Mitnick Security Consulting. <https://www.mitnicksecurity.com/blog/healthcare-cybersecurity>

4

DIGITAL TRANSFORMATION IN PUBLIC HEALTH: Investment potential



Digital transformation in public health is an increasing priority as governments and health systems seek to improve efficiency and accessibility. This is particularly relevant in developing nations, where infrastructure limitations and service delivery gaps highlight the need for scalable, interoperable digital health technologies that can support integrated and sustainable care models.

In regions such as Southeast Asia, Africa and India, investment priorities are aligning around emerging technologies that enable decentralised, data-driven, and preventive healthcare systems. These shifts are shaping the development of digital health ecosystems tailored to local needs and capacities.

The following section explores these investment priorities in greater detail, highlighting key technology areas and their relevance across regional contexts:



Quantum AI-Powered Hyper-Personalized Medicine

Precision medicine is being redefined by the convergence of quantum computing and AI, enabling hyper-personalised diagnostics and treatments.

Key investment areas include:

- ▶ Southeast Asia: Optimising treatment with real-time patient simulations
- ▶ Africa: AI-powered risk evaluation based on environmental and genetic data
- ▶ India: Early disease detection and cancer treatment using quantum-enhanced AI

Potential Benefits: By slashing diagnostic timelines from months to minutes, quantum computing has the potential to revolutionise clinical decision-making and improve health outcomes at scale.



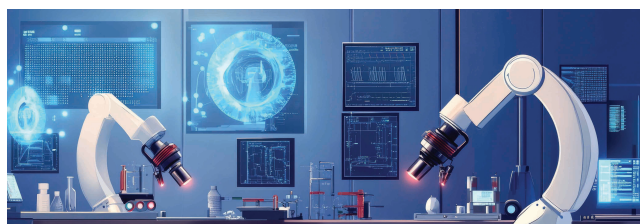
Web3 and Decentralised Health Economies

Blockchain and Web3 technologies are laying the groundwork for decentralised, patient-centric health ecosystems that incentivise participation and ensure data sovereignty.

Key investment areas are:

- ▶ Southeast Asia: Preventive care is incentivised by tokenised healthcare
- ▶ Africa: Microinsurance and DAOs driven by blockchain for rural healthcare
- ▶ India: Health Fi models that incentivise the sharing of anonymous data

Potential Benefits: Fostering financial inclusivity, empowering patients, and creating scalable digital health economies.



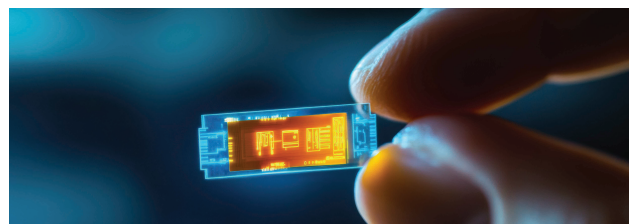
AI-Powered Intelligent Bio-Habitats and Predictive Public Health

AI-driven smart environments are enabling real-time monitoring and proactive responses to public health threats.

Region-specific key investment areas include:

- ▶ Southeast Asia: Intelligent biosensors to monitor infectious diseases in real-time
- ▶ Africa: Forecasting disease outbreaks through climate-adaptive healthcare
- ▶ India: AI-powered smart health cities and pandemic preparedness

Potential Benefits: With AI at the helm, public health models can evolve from reactive to predictive, helping governments prevent crises before they escalate.



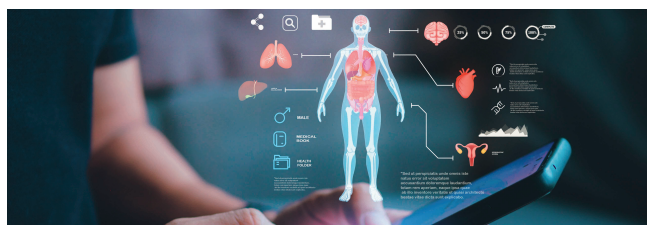
Nanotech Implants and Self-Healing Biosensors

Breakthroughs in nanotechnology are transforming diagnostics and continuous health monitoring.

Key investment areas are:

- ▶ Southeast Asia: Brain-machine interfaces for neurorehabilitation and mental health
- ▶ Africa: AI-integrated biosensors for early disease detection
- ▶ India: Drug-delivery implants and smart contact lenses

Potential Benefits: Real-time, non-invasive diagnostics are particularly impactful in filling gaps in healthcare.



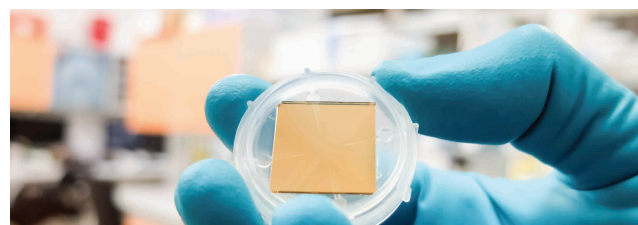
Digital Twin Technology Driven by AI for Preventive Health

AI-powered digital twins create virtual replicas of a person's health profile using real-time data. These digital models can simulate how a patient might respond to different treatments, helping health practitioners to personalise care and predict health issues early.

Investment areas include:

- ▶ Southeast Asia: hospital optimisation and AI-powered robotic surgery
- ▶ Africa: Precision medicine is being expedited by virtual patient models
- ▶ India: Personalised medical simulations using digital twins

Potential Benefits: Enables dynamic resource allocation and treatment modelling; digital twins can dramatically reduce healthcare costs while enhancing outcomes



Neuromorphic & Edge AI for Rural Healthcare

Neuromorphic & Edge AI enable fast, energy-efficient decision-making directly on healthcare devices, mimicking brain-like processing.

Key investment areas include:

- ▶ Southeast Asia: Autonomous AI systems to support strained health services
- ▶ Africa: Neuromorphic computing for ultra-efficient health solutions
- ▶ India: Mobile diagnostics powered by edge AI in resource-constrained environments

Potential Benefits: Where traditional AI infrastructure falls short, neuromorphic and edge AI offer faster, more power-efficient diagnostic capabilities, making them well-suited for real-time, resource-constrained healthcare environments



Sustainable Biopharma Economies and Circular Health

Focus on reducing waste, reusing resources, and designing eco-friendly processes across the pharmaceutical and healthcare systems.

Key investment areas include :

- ▶ Southeast Asia: Biomedical applications leveraging repurposed e-waste
- ▶ Africa: CRISPR-enabled bio-sustainable pharmaceutical manufacturing
- ▶ India: Lab-grown organs and regenerative medicine aided by AI

Potential Benefits: By promoting efficient resource use and eco-friendly practices, sustainable biopharma and circular health can reduce operational costs, minimise environmental impact, and support long-term healthcare resilience.



Future-Facing Investment Approaches in Digital Health HealthTech's Future in Digital Health would involve

- ▶ **Decentralised funding pools** for health startups, utilising Decentralised Autonomous Organisations (DAOs) and **tokenised investments** to offer more flexible and accessible financing models.
- ▶ **Government-backed AI-driven investments**, known as **Sovereign AI-Powered Health Funds**, which focus on supporting innovative healthcare solutions
- ▶ The integration of **AI and quantum computing** to optimise fund allocation through **quantum-backed predictive finance**, enhancing decision-making and investment strategies
- ▶ **AI-Driven Public Health Impact Bonds**, which provide financial support based on **predictive and preventive health outcomes**, encouraging proactive health management
- ▶ **Artificial Intelligence-Powered Crowdsourced R&D**, driving **innovation in global health efforts** through collaborative and AI-enhanced research



Conclusion:

The next decade of **digital health investments** must evolve beyond small, incremental improvements to build **AI-first, blockchain-powered, quantum-enhanced, and web-integrated** healthcare ecosystems.

The future of scalable, inclusive, and predictive global health solutions will rely on a **multi-stakeholder approach**, involving **impact investors, private capital, sovereign funds, and decentralised finance**, driving innovation and access to care worldwide.

BDO INDIA

Management Consulting

Healthcare Advisory



BDO India offers a robust suite of digital health solutions that are **scalable, inclusive, and grounded** in human-centred design. Our expertise spans the development and deployment of innovative dashboards, AI-driven platforms, mobile applications, and collaborative digital tools - empowering clients to make data-informed decisions and deliver more efficient health services.

BDO India's Digital Health Solutions

- Governments
- Corporates
- Multilaterals
- INGOS/NGOS



**Innovative dashboards / platforms
for data driven decision-making**

- Health system strengthening
- Health programs
- Healthcare facilities
- Monitoring & Evaluation

- Governments
- Corporates
- Multilaterals
- INGOS/NGOS



Applications and E-learning solutions

- Mobile applications
- WhatsApp chatbots
- E-learning solutions

- Start ups
- Corporates
- INGOS/NGOS



Online Collaboration Hubs & Forums

- Virtual knowledge sharing platforms
- E-learning modules

- Start ups
- Corporates
- INGOS/NGOS



AI driven solutions

- Real-time trend analysis
- AI driven survey to support M&E analysis
- Predictive analytics
- E-learning solutions

Our unique selling points lie in our ability to design end-to-end solutions tailored to diverse stakeholder needs, from governments and multilateral agencies to INGOs, corporates, and health startups.

At the heart of our approach is a strong commitment to **human-centred design**. Our solutions are **custom, modular, and interoperable**, developed with a focus on user experience to ensure high adoption rates and streamlined workflows.

Every platform we deliver is built with **data intelligence at its core** - tracking performance, guiding policy decisions, and optimising resource allocation for greater health impact. Through a **blend of technical agility, inclusive design and sustainable digital solutions**, BDO India is redefining the way digital health solutions are imagined, scaled, and implemented.

Our unique selling points: Scalable, Inclusive and Human-Centred Digital Health Solutions



End-to-End Digital Health Solutions

From piloting to national rollouts, BDO has successfully designed, developed, and implemented large-scale decision support systems



Scalability & Adaptability

- ▶ Proven ability to scale technology solutions nationwide while ensuring localization and adaptability.
- ▶ As a part of our solution suite, we ensure responsiveness and cloud-based global accessibility



Agile in Digital Health Tech

We design custom, modular, and interoperable digital health architectures, ensuring rapid deployment, iterative improvements, and user-centric functionality.



Sustainable and Data-Driven Impact

Implementing data intelligence platforms to track performance, improve resource allocation, and enable evidence-based policymaking.



Multi-Sector Collaboration

- ▶ Experience working with governments, health agencies, and multilateral organizations to digitally transform health systems.
- ▶ Facilitate cross-sector data integration, fostering public-private partnerships to enhance scalability and innovation.



Human-Centered Design Approaches

We prioritize user experience, ensuring that digital health solutions are intuitive, accessible, and designed around the needs of the end-user to optimize workflows and improve adoption rates.



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**Includes employees from BDO RISE and BDO EDGE*

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