

HEALTHCARE TOURISM OPPORTUNITIES FOR INDIA

By

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(Consultant and Author)

EXIM TEAM

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with a foreword from

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Foreword

Healthcare, like food and shelter, is a basic need of Humanity. Given the potential India holds as a healthcare destination, the healthcare tourism sector can be a major source of foreign exchange earning for the country. Exim Bank has, hence, chosen this as one of the focus sectors for study. The study on 'Healthcare Tourism : Opportunities for India' presents a detailed analysis of the opportunities offered by the sector and the action points for the relevant stakeholders for tapping these opportunities.

India's healthcare sector has made impressive strides in recent years and the country is increasingly projected as a 'healthcare hub'. Several features have positioned India as an ideal healthcare destination, like cost effective healthcare solutions, availability of skilled healthcare professionals, reputation for successful treatment in advanced healthcare segments, increasing popularity of India's traditional wellness systems and rapid strides made in information technology. The sector is witnessing a 'reverse brain-drain' trend, with increasing number of specialists, who have been practicing abroad, showing keen interest to come back and practice in India. Such developments further enhance the potential of India as a 'healthcare hub' of the world.

India has many tourist attractions to offer – mountains, long coastline, rain forests, historical locations, cities with royal palaces, rich and varied cultures and festivities. We also have a rich heritage of healthcare systems, such as Ayurveda and Yoga. Leveraging the tourism potential with our strengths in healthcare sector would attract more tourists, than now.

Traditionally, 'medical tourism' is associated with travellers seeking urgent medical interventions (such as surgeries and transplantation). However, such an approach would broadly exclude the wellness seekers travelling to other parts of the world. Also, it is important to consider wellness with a holistic approach of body, mind and soul. In this context, this study has defined healthcare tourism in a broader perspective. Estimates show that about 500,000 international healthcare travellers (including NRIs) have visited India in 2006. Estimated revenue generation out of healthcare tourism is about Rs. 2,400 crores or around US \$ 600 million, in 2006.

People travel to India for availing healthcare services for diverse reasons. While healthcare tourists from United States are primarily reported to be travelling to India, as the cost of getting treatment in home country is expensive, travellers from Europe are reported to be seeking healthcare services in India due to the complexity of availing the healthcare services in their home country. Some of the tourists from West Asia and Africa region travel to India due to affordability of treatment and quality of services rendered. A section of tourists from different parts of the world travel to India for traditional healthcare services, such as Ayurveda and Yoga.

Healthcare tourism sector also has its own challenges. The domestic healthcare infrastructure indicators of India highlight several areas for improvement. With limitations in public healthcare spending, private sector has a major role to enhance the healthcare infrastructure in India. Indian healthcare service providers need to prove quality consciousness and get international accreditation. The negative perceptions about India, with regard to public sanitation / hygiene standards or prevalence of contagious diseases, counter the positive vibes created by the cost competitiveness of Indian healthcare systems. In India, the Human Organs Transplant Act, 1994 has laid down various regulations; the Act does not permit foreigners availing organs from a local donor. Countries like Singapore have an enabling organ transplantation Act, which promotes 'transplantation tourism'. Availability of hotel rooms in India is considered to be more difficult as compared to other countries. In addition, the cost of accommodation is another hindrance to middle-level international travellers visiting India.

It is necessary to package the healthcare and tourism services, in a better manner, so that India could attract more travellers from abroad seeking healthcare solutions. Public-Private Partnership is required to provide quality services to attract potential healthcare seekers from various countries.

Promotion of healthcare tourism would result in development of associated sectors, such as medical equipment manufacturing, telemedicine, medical diagnostics, outsourcing of hospital administration and health insurance. There are also opportunities in the infrastructure sectors, due to higher demand for travel (airlines, road / rail transport, hotels, hospitals) and communication (telephone, internet). Newer models of campaigning and promotions provide business opportunities for media and mass-communication segments. Consultants, in a wide spectrum of areas covering healthcare, tourism, infrastructure, communications, media, marketing and promotions, are likely to get business opportunities with the growth in healthcare tourism sector. With such greater level of opportunities, financial institutions like Exim Bank can play an increased role in supporting healthcare and healthcare-tourism associated projects in India and abroad.

This study has been conducted under the guidance of Dr. Vinayshil Gautam, Founder Director of Indian Institute of Management, Kozhikode, and currently Professor of Management Studies at the Indian Institute of Technology, New Delhi. Exim Bank's Research Team conducted an in-depth field level study with extensive interaction with existing and potential players and other relevant agencies to bring out this publication. I believe that this study would be of immense use to the players of tourism and healthcare sectors, as well as policy makers and other relevant agencies.

Mumbai
February 7, 2008

T. C. Venkat Subramanian
Chairman and Managing Director
Export-Import Bank of India

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Preface

Healthcare tourism is one of the flavours of the times. Given the recent spurt of interest in the area, there is an obvious need for collation of information and formulating the opportunities it provides for India. This volume may provide some responses in that direction.

The title 'Healthcare Tourism: Opportunities for India' is the third publication in the trilogy which the Export-Import Bank of India has brought out, touching upon the Indian healthcare systems, the other two titles being 'Exporting Indian Health Care' and 'Road Beyond Boundaries'.

It is unfortunate but true that a very large proportion of skill formation in the tourism sector, not to overlook travel, is essentially at a 'toolbox' level. What is needed is a comprehensive understanding of the trends in the sector, insight into overt and the covert patterns and recognizing the implications of the field-work and analysis.

It was typical of the kind of cutting edge leadership Shri. T C Venkat Subramanian, Chairman and Managing Director, Exim Bank, has provided to the Bank that he thought of this area of Healthcare Tourism as one of its research studies. Such an approach goes well with the kind of promotional and developmental role that the Exim Bank provides for the world of International Trade and Business, from the Indian perspective.

Given the pattern of the emerging tourist flow into Asian countries and within the Asian countries, it is natural to classify the numbers into viable segments. Adventure tourism, heritage

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tourism, eco-tourism are but a few of the growing domains of interest. Healthcare Tourism ranks amongst the more significant and emerging areas of tourism.

While reflecting upon healthcare tourism, there are two things to keep in mind. One is that good health is the foundation of any activity, enjoyment and worthwhile living. The second is that a wealth of any country can be judged by several indicators. Of this, health of its citizenry is one of the most critical ones. Indeed, as countries and communities mature and the average citizen rises beyond the daily chores of making a living, concerns for viable healthcare practices become abundantly obvious. However, before analysis can begin, information needs to be collated.

This work is a modest but a significant step in that direction. It is addressed to those who wish to look at the concerns of healthcare management especially in terms of opportunities for India. This book also attempts collation of the data and deciphers certain patterns of growth and development.

Like in many areas, the way Chinese have projected the efficacy of their traditional healing systems, there is a message to be learnt. The Thai are not far behind. Indeed it is not often enough or adequately recognized that human beings did take care of their health for many millennia, long before the birth of the 'modern' pharmaceutical sciences or indeed the skills of the chemists generated so much faith. Indeed the entire bias of the Indian health care system has been preventive, rather than curative. The science of Yoga or Ayurveda are merely two of the several manifestations of this approach.

Various exhibits, especially in Chapter Five, are interesting to go through. Indeed they lay the foundation for future research, which hopefully will take place with higher sophistication and greater utility.

The significance of this book lies in attempting, for the first time ever, a pooling of information from hospitals, hotels, healthcare service providers and indeed the trade itself, on the theme of healthcare tourism, in a focussed manner. Integrating the existing national tourism policy (2002) with concerns of telemedicine is a daring attempt at drawing the big picture. This may be daunting but one which cannot be ignored.

People are travelling to India and travelling within India not just for specialized/convenient allopathic interventions but also for rejuvenation, therapeutic interventions, spiritual and proactive healthcare.

It is unfortunate that an accurate and true lay of the land of healthcare tourism with many of the assets of conventional Indian wisdom of healthcare, is inadequately represented in modern idiom, hence often derisively covered and commented on by those who do not know. The nature, influence and impact of various *mantras* and spiritual interventions is still to be mapped, but till that happens it is not necessary to confuse it with superstition. Aromatherapy is yet to get its pride of place. Looking at diet with an eye on the therapeutic influence of various natural products is still to acquire universal practice. For example, how many use honey as a tranquilizer or a sedative or use cabbage for the chemicals it contains to heal ulcer?

The examples are many and faith on drugs and pharmaceuticals is almost a one sided story.

At the end of the day, real healthcare is the natural strength of the body and for that, sound nutritional habit, just as much as exercise, are the key.

Healthcare can be no different even when it is to be seen in conjunction with Tourism.

I know this volume will be read carefully, by all those who feel moved to take a holistic view on the subject matter.

New Delhi
February 5, 2008

Vinayshil Gautam

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Acknowledgement

This study is an outcome of the efforts put in by the Exim Bank study team under the guidance of Dr. Vinayshil Gautam, Head of the Department of Management Studies and A Alsagar Chair Professor at IIT, Delhi. The study has been made possible through active support and advice from institutions / individuals working for the cause of Indian healthcare and tourism sectors. The Team sincerely acknowledges the contributions and support extended by every individual and institution.

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Chief Operating Officer, Srinivasa Cardiology Centre, Bangalore; Ms. Yogita, Isha Yoga Foundation, Coimbatore; Dr. B. G. Krihnaswamy, General Manager (Product Development and Exports), The Arya Vaidya Pharmacy (Coimbatore) Ltd., Coimbatore; Dr. N. S. Murthy, Medical Director, Asia Cryo-Cell Private Limited, Chennai; Mr. C. Sarat Chandran, Director, Indo-Australian Chamber of Commerce and Industry, Chennai; Dr. Debashish Ganguli, Executive Director, Akshar Healthcare (P) Ltd; Dr. Pravin Dave, Medical Director, Akshar Healthcare (P) Ltd., Ahmedabad; Mr. Mani Iyer, Director, Intas BioPharma, Ahmedabad; Dr. Bharat Gadhavi, Medical Director, Sterling Hospitals, Ahmedabad; Prof. M S Bhagel, Director, Gujarat Ayurved University, Jamnagar; Dr. A P Singh, Director, Indian Systems of Medicine and Homeopathy, Government of Gujarat, Ahmedabad; Mr. Chandrashekar S Murthy, Dhanvantri Vaidyashala, Ahmedabad; Mr. P D Vaghela, Managing Director, Tourism Corporation of Gujarat Ltd., Ahmedabad; Mr. Anil Rathore, General Manager, The Pride Hotel, Ahmedabad; and Mrs. Sejal Thakkar from the Art of Living Foundation, Ahmedabad.

Preparation of case studies of service providers in this segment was possible with the active support of officials in institutions such as Escorts Heart Institute and Research Centre, New Delhi; Frontier Lifeline Hospitals, Chennai; Kerala Institute of Medical Sciences, Manipal Health Systems, Bangalore; P D Hinduja National Hospital and Medical Research Centre, Mumbai; Sterling Hospital, Hyderabad; and Wockhardt Group, Bangalore.

The Study Team takes the opportunity to convey its grateful thanks to all those, who have contributed to the completion of this Research Work.

Abbreviations

AAHC	Accreditation Association for Ambulatory Healthcare
AIIMS	All India Institute of Medical Sciences
ALPHA	Agenda for Leadership in Programs in Healthcare Accreditation
AOA-HFAP	American Osteopathic Association's Healthcare Facilities Accreditation Programme
APLAC	Asia Pacific Laboratory Accreditation Cooperation
AVS	Arya Vaidya Sala
BSI	British Standards Institute
CAP	College of American Pathologists
CIHR	Canadian Institutes for Health Research
CMS	Centers for Medicare and Medicaid Services
COPD	Chronic Obstructive Pulmonary Disease
CRISIL	Credit Rating And Information Services of India Ltd
CSR	Corporate Social Responsibility
DCSC	Disease- or Condition-Specific Care
DNB	Diploma of National Board
DOT	Department of Tourism
ECG	Electro Cardigraph
EDTA	Ethylene Diamine Tetra Acid
EEA	European Economic Area

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EHIRC	Escorts Heart Institute and Research Centre
ENT	Ear Nose Throat
EU	European Union
FRRO	Foreigners Regional Registration Office
FDI	Foreign Direct Investment
GAP	Good Agricultural Practices
GDP	Gross Domestic Product
GMP	Good Manufacturing Practices
GP	General Practitioner
HEPA	High-Efficiency Particulate Air filter
HOTA	Human Organ Transplant Act
HSR	Hub-Spoke-Rim
IAHV	International Association for Human Values
ICMR	Indian Council of Medical Research
IHCF	Indian Healthcare Federation
ILAC	International Laboratory Accreditation Cooperation
IPP	Investments Priorities Plan
IRDA	Insurance Regulatory and Development Authority
ISO	International Organisation for Standardization
ISQua	International Society for Quality in Health Care
ITI	IT Infrastructure for Healthcare
IT	Information Technology
JCAHO	Joint Commission Accreditation for Health Organisations
JCIA	Joint Commission International Accreditation
JOD	Jordanian Dinar
JCI	Joint Commission International
KEMA	Keuring Electrotechnisch Materieel Arnhem
KIMS	Kerala Institute of Medical Sciences
KTDC	Kerala Tourism Development Corporation
MDA	Market Development Assistance

Abbreviations

MIDAS	Maharashtra Infrastructure Development and Support Act
MIDC	Maharashtra Industrial Development Corporation
MOPH	Ministries of Public Health and Commerce
MOT	Ministry of Tourism
MRI	Magnetic Resonance Imaging
MOU	Memorandum of Understanding
MTDC	Maharashtra Tourism Development Council
MTERA	Medical (Therapy, Education & Research) Act
NABH	National Accreditation Board for Hospitals and Healthcare Providers
NABL	National Accreditation Board for Laboratories
NCQA	National Committee for Quality Assurance
NHP	National Health Programmes
NHS	National Health Service
NRI	Non-Resident Indian
NYPORTS	New York Patient Occurrence Reporting and Tracking System
PET	Positron Emission Tomography
PITAHC	Philippine Institute of Traditional And Alternative Healthcare
PMI	Private Medical Insurance
PMTP	Philippines Medical Tourism Programme
QCI	Quality Council of India
R&D	Research and Development
SPV	Special Purpose Vehicles
STB	Singapore Tourism Board
TAT	Tourism Authority of Thailand
TCM	Traditional Chinese Medicine
TEV	Tourism Expenditure by Visitors
TPA	Third Party Administrator
UNWTO	United Nations World Trade Organization
WTO	World Tourism Organisation
