

Medical & Wellness Tourism Enchanting India



PROGRESS HARMONY DEVELOPMENT

Estd. - 1905

July'2014



Knowledge Partner



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About PHD Chamber

PHD Chamber of Commerce and Industry, established in 1905, is a vibrant and proactive representative organization of business and mercantile community of Northern and Central India. The Chamber lives by the chosen motto of 'In Community's Life & Part of it'.

This apex regional organization plays a proactive role in India's development and acts as much needed link between government and industry. It acts as a catalyst for rapid economic development and prosperity of community in the region through promotion of trade, industry and services. Our focus areas are Infrastructure, Industry Policy, Education & Skill Development, Health & Rural Development & Agribusiness.

The Chamber caters to the business, economical and social interests of the 12 States of Bihar, Chhattisgarh, Delhi, Haryana, Himachal Pradesh, Jammu & Kashmir, Madhya Pradesh, Punjab, Rajasthan, Uttar Pradesh, Uttarakhand, Jharkhand and the Union Territory of Chandigarh. The Chamber Comprises of over 1600 members as its direct members.

PHD Chamber provides an excellent forum to industries for getting their problems addressed by and suggestions put up to relevant government authorities at the Central and State level, through focused interactions with the Government officials and submission of memoranda and representations.

PHD Chamber produces well researched background papers on topical issues to initiate informed debate and discussion. It has a strong global linkages build up through over 60 MoUs with foreign bodies.

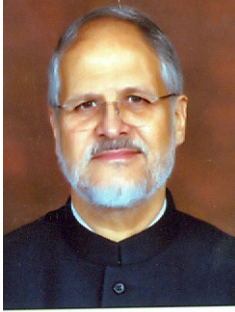
To discharge its social responsibility, the Chamber has two voluntary organizations, namely PHD Rural Development Foundation (PHDRDF) & PHD Family Welfare Foundation (PHDFWF) for fulfilling its commitments to the cause of socio-economic development and to promote the role of corporate sector for the upliftment of rural masses.



उपराज्यपाल
दिल्ली
LIEUTENANT GOVERNOR
DELHI



राज निवास
दिल्ली-११००५४
RAJ NIWAS
DELHI-110054



11th June, 2014

MESSAGE

I am happy to learn that the PHD Chamber of Commerce and Industry (PHDCCI) is organizing a summit on "Medical and Wellness Tourism" in New Delhi.

India has always been a preferred destination for tourists. Tourists from all across the globe visit India to explore its rich heritage, culture, diversity, natural beauty, and the warmth of its people.

Tourism is a growing sector in India and holds huge promise, especially in the upcoming areas of wellness and medical tourism. While there are several innate strengths of India's wellness industry and the medical sector, several issues need sharper focus, if we wish to compete in a global scenario. I believe this Summit on "Medical and Wellness Tourism" will be able to successfully draw a roadmap for the development of Medical Tourism in the country.

I extend my warm wishes to the PHD Chamber of Commerce and Industry for this remarkable initiative and wish their proceedings my very best.


(Najeed Jung)





सत्यमेव जयते

परवेज़ दीवान

सचिव

Parvez Dewan

Secretary

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MESSAGE

It is heartening to know that the PHD Chamber of Commerce and Industry (PHDCCI) is organizing the Medical and Wellness Tourism Summit 2014 on 25th July, 2014 in New Delhi.

Tourism has been an important contributor to the country's GDP. Developing the medical tourism sector according to the needs and expectations of tourists is imperative for the healthy growth of the sector.

Today, the Medical Tourism Sector in India is growing rapidly and numerous companies including international brands are being attracted. The Government has been working towards the upliftment of the medical tourism sector in all possible ways.

There is no doubt that the country has immense potential to become the world's busiest medical tourism destination. I am sure that in the coming years the tourism industry in India will flourish leaps and bounds meeting the global standards.

I congratulate PHD Chamber for hosting this important Summit where pioneers, matter experts, academicians and government officials could share their vision, knowledge and experience to formulate the road map for creating an incredible image of India all over the world.

I wish the function all the success.

(Parvez Dewan)

16th June, 2014



लव वर्मा
सचिव
LOV VERMA
Secretary



भारत सरकार
स्वास्थ्य एवं परिवार कल्याण विभाग
स्वास्थ्य एवं परिवार कल्याण मंत्रालय
Government of India
Department of Health and Family Welfare
Ministry of Health and Family Welfare



MESSAGE

It gives me great pleasure to know that the PHD Chamber of Commerce and Industry is organizing **“Medical and Wellness Tourism Summit-2014”** on 25th July, 2014 in New Delhi.

India, a country blessed with diversity, both in terms of culture and geography, has always been a fascinating nation to tourists. Tourism and Hospitality has continued to be a critical sector for economic development and for sustaining employment.

Many people from the developed world come to India for the rejuvenation promised by Yoga and Ayurvedic massage, while many consider it a destination for surgeries. A good blend of top-class medical expertise at attractive prices is helping a growing number of Indian corporate hospitals to attract foreign patients.

I am sure that the Summit will provide valuable inputs for the future roadmap for the medical and wellness sector.

I congratulate PHD Chamber of Commerce and Industry for this remarkable initiative and wish the Summit great success.


Lov Verma

New Delhi
04.07.2014





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SHARAD JAIPURIA

President



7th July 2014

Message

The theme of the “**Medical & Wellness Tourism Summit 2014**” organised at New Delhi on July, 25 - 2014 by PHD Chamber of Commerce and Industry with the help and support of Ministry of Tourism, Government of India is to promote medical tourism in India. The idea behind taking Government of India as a partner is to focus on showcasing the unexplored destinations and huge untapped health tourism potential in the country.

PHD Chamber of Commerce and Industry is a dynamic and vibrant organisation representing the business community of Northern and Central India. It aims to provide a platform to boost industrial growth and serve various segments of the economy and the policymakers alike.

Medical or Health tourism has become a common form of vacationing, and covers a broad spectrum of medical services. It mixes leisure, fun and relaxation together with wellness and healthcare.

This summit will yield a plethora of innovative and thought-provoking solutions to existing problems, as well as, new avenues that the industry could set forth upon. I commend all those who have worked tirelessly to put this summit together and I wish it the best of luck and I am certain it will be a grand success.


(Sharad Jaipuria)





PROGRESS HARMONY DEVELOPMENT

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SAURABH SANYAL

Executive Director



MESSAGE

I am pleased to learn that the PHD Chamber of Commerce and Industry (PHDCCI) is organizing the **"Medical and Wellness Tourism Summit 2014"** on 25th July, 2014 in New Delhi.

Tourism has been an important contributor to the country's GDP. Developing the medical tourism sector according to the needs and expectations of the tourists is imperative to the healthy growth of the sector.

Amongst all global medical tourism destinations, India undoubtedly offers the best to the world in terms of quality, cost and care. Reputed Indian hospitals now have the latest cutting edge technology and world class doctors. The flow of overseas patients to India is growing every year at a healthy pace.

I congratulate the Tourism team of PHD Chamber of Commerce and Industry for this remarkable initiative and wish the summit a success.


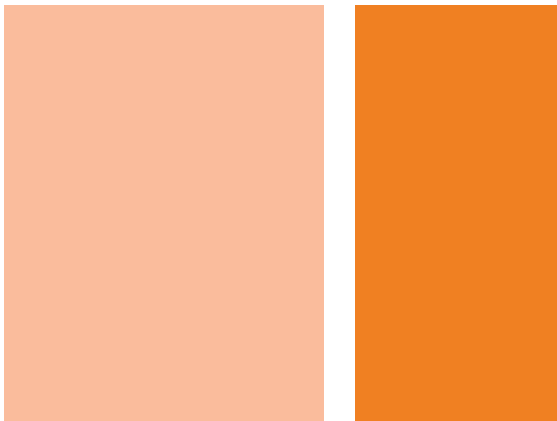

Saurabh Sanyal



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The term refers to the act of traveling to other countries to obtain medical/surgical care and alternative treatment like rejuvenation and Ayurvedic treatments.



1

MEDICAL & WELLNESS (M&W) TOURISM: EMBRACING THE WORLD

1.1 M&W TOURISM: TRACING THE ORIGIN

Medical & wellness tourism is a new form of a niche tourism market which has been rapidly growing in recent years. The term refers to the act of traveling to other countries to obtain medical/surgical care and alternative treatment like rejuvenation and Ayurvedic treatments. According to Goodrich & Goodrich (1987), medical & wellness tourism is the attempt by nations to attract tourists by deliberately promoting health services and facilities, in addition to its regular tourist amenities.





Medical & Wellness Tourism: Brief History



Epidauria: Sanctuary of the Healing God Asklepios

Thousands of years ago, Greek pilgrims used to travel from all over the Mediterranean to the small territory in the Saronic Gulf called Epidauria. This territory was the sanctuary of the healing god Asklepios. Epidauria became the original travel destination for medical tourism.



Medieval England

Spa towns and sanitariums may be considered an early form of medical tourism. In eighteenth century England, for example, patients visited spas because they were places with supposedly health-giving mineral waters, treating diseases from gout to liver disorders and bronchitis.



Contemporary Times

Today, people travel beyond borders for medical/cosmetic surgeries and alternative therapies like ayurveda, rejuvenation therapies, hot spring baths etc. in order to improve their health and well-being.



1.2 COMPONENTS, DIMENSIONS & IMPORTANCE OF M&W TOURISM

With the wave of globalization gripping the world and higher personal income promoting the culture of consumerism, people world over are now travelling to different countries, in order to capitalize on the medical and wellness therapies offered at those places which lay the base for mental satisfaction/relaxation and healthy living. Today people are way more conscious about maintaining a healthy body, mind

and soul. Millions of people nowadays opt for travelling to tourist destinations worldwide not just for tourism purpose, but for seeking better healthcare and well-being prospects. Such tourists are called medical tourists. Medical tourism, on holistic basis, encourages allied activities including sight-seeing/touring, shopping and exploring rejuvenation and wellness of mind and soul.

MEDICAL & WELLNESS TOURISM

Medical Tourism

Medical tourism involves people who travel to a different place to get treated for a disease, ailment, or a condition, or to undergo a cosmetic procedure, and who are seeking lower cost of care, higher quality of care or different care than what they could receive in the home country.

Medical tourist: These people are generally ill or seeking cosmetic/dental surgical procedures or enhancements.

Wellness Tourism

Wellness tourism involves people who travel to a different place to proactively pursue activities that maintain or enhance their health and wellbeing, and who are seeking unique, authentic or location based experience/therapies not available in the home country.

Wellness tourists: These tourists generally seek integrated wellness and preventive approaches to improve their health/quality of life.

Source: Global Spa Summit

The major components of medical & wellness tourism include the following:

- Medical Treatment/Procedures:** This involves the traditional medicine practices/surgeries completely inclined towards treating diseases and disorders of human body.
- Traditional/Alternative Therapies:** These include traditional/vedic therapies like yoga, Ayurveda, salt baths, essential oil massage, rejuvenation therapies among others.

Medical & Wellness Tourism: Components



The number of people seeking enhanced healthcare options has grown substantially in the last few years, which has given a tailwind to the countries to promote medical and wellness tourism, and augment the tourism derived income. People from developed countries prefer health tourism because of sky rocketing treatment costs in their home country.

Medical tourism destinations provide high quality treatment at low cost, which means the medical tourist gets treatment at a fraction of cost that he has to spend for the same procedure in his home country. Moreover, they get an opportunity to visit a new country and enjoy its tourism products during the recuperative period. Medical tourism is becoming a preferred form of vacationing as its covers a broad spectrum of medical services and mixes leisure, fun and relaxation together with wellness and healthcare.



MEDICAL & WELLNESS TOURISM: DIMENSIONS

Tourist Motivation	Typical Activity/Location
Medical/Cosmetic	Hospitals, Clinics
Relaxation / Rejuvenation	Spas, Massage, Yoga, Beaches, Mountains
Experiential	Festival Spaces
Spiritual	Pilgrimage, New Age Events, Yoga Retreats

M&W Tourism: Incumbent Sectors of the Economy



Medical tourism has its own set of positive impact on a country's economy. For instance, when a tourist visits a country for medical or wellness reasons, he won't remain restricted to the hospitals, spas, or rejuvenation therapy centers. Certainly he'll explore other states/cities for relaxation just like an ordinary tourist. Moreover, a general expense on shopping, food, stay, travelling, etc. is unavoidable. All such expenses contribute in growing the economical wealth. Not just the hospital/medical sector reaps the benefits, but other industries like tour & travel, hospitality, retail (clothing/general merchandise), food, and traditional therapy sector among others, capitalize on medical & wellness tourism.



1.3 M&W TOURISM: GLOBAL ARENA

The country claiming the topmost slot in terms of ranking by medical tourist arrivals is Thailand which registered an inflow of nearly 2.5 Lakh medical tourists in the year 2012, for receiving a wide range of healthcare services, the most notable being cosmetic surgery and rehabilitation treatment services. Thailand is home to some of the best and cheapest rehabs in the world, i.e. the Cabin. Many international tourists flock Thailand's rehabs because of their privacy, exemplary services and low cost (between US\$1,000 and US\$7,000 for a complete program). This is very economical when compared to the average US\$30,000 cost for the best rehab treatment programs in the US.

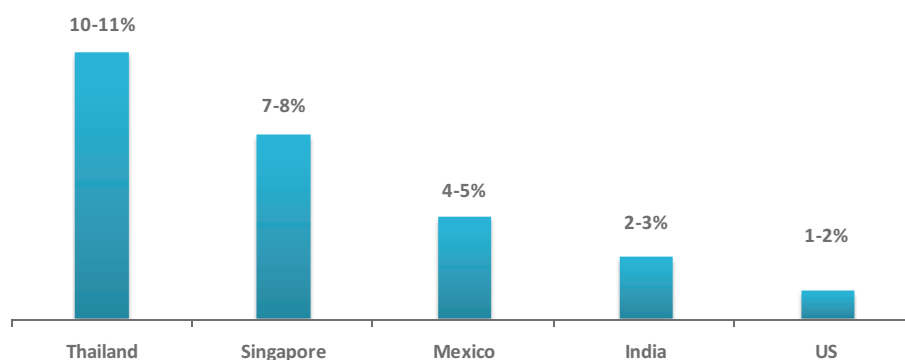
On the other hand, a record 8 Lakh medical tourists flocked the US to seek treatment on the most complicated health conditions. The US tops the list of countries with the best healthcare facilities and professionals. This explains why the US receives such a high number of patients in need of highly specialized medical services despite the high cost of healthcare services. It is also worth noting that the US is home to the best plastic surgeons in the world.

Coming down to our home country- India, it made it to the top 5 spot because of hosting a nearly 1.66 Lakh medical tourists from all over the world in 2012. India is more popular among medical tourists interested in orthopedics and cardiac procedures. Many patients especially from Africa also visit India every for cancer diagnosis and treatment. Also, special procedures, i.e. coronary artery bypass surgeries attract many US patients because the procedure is 90% cheaper in India (US\$30,000 in India compared to US\$300,000 in the US). Although many hospitals in India are not internationally accredited, there are many top private hospitals in India offering world class services.



In the year 2012, the number of medical tourists arriving in the country as a percentage of the total number of foreign tourist arrivals was highest for Thailand at 10-11% and lowest for the US at 1-2%. Herein, India claimed 4th slot with 2-3% share of medical tourists in the total number of foreign tourist arrivals.

Medical Tourists as % of Total Foreign Tourists



Source: World Bank; Singapore Tourism Board; Ministry of Public Health-Thailand; Bureau of Immigration-India; RNCOS
Note: The percentages are calculated as the number of medical tourists out of the total foreign tourist arrivals; Data for 2012

2

M&W TOURISM IN INDIA:

EPITOME OF VEDIC & CONTEMPORARY TREATMENT

Asia is one of the most prominent destinations for global medical tourists due to its cost efficiency and offering better value for money. The number of medical tourists to Asian countries is increasing rapidly each year. The four main countries involved in this trade include India, Singapore, Thailand and Malaysia (CII-McKinsey, 2002).

Country-wise, India is perceived as one of the fastest growing medical tourism destinations. In recent years, government support, low cost, improved healthcare infrastructure, and its rich cultural heritage, have taken Indian medical tourism to the new heights. Overall, its emergence as one of the world's most cost-efficient medical tourism destinations has helped India to attain a position among the global leaders (Patel et al 2013).

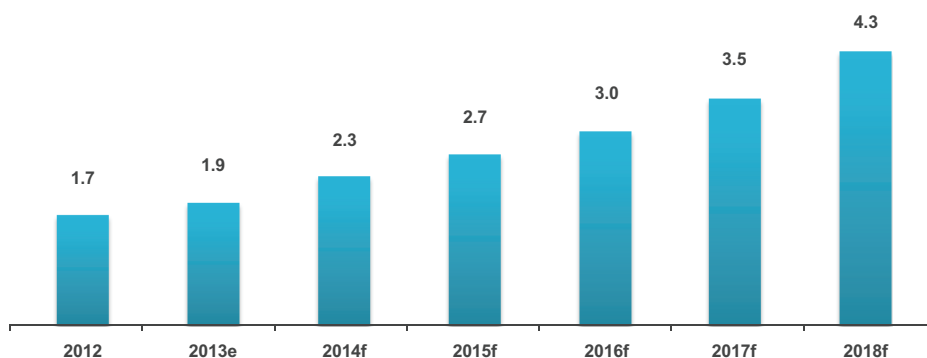




2.1 MEDICAL TOURISM INDUSTRY

Large opportunities exist in tourism in India. It is a highly desirable destination for tourists because of its tourism resources. Niche tourism must be developed for the optimum utilization of tourism resources. Medical tourism is consequently gaining huge importance now. It is also non-seasonal in nature which bodes well for tourism growth annually.

Medical Tourists Arrival in India (Lakh), 2012-2018



Source: Ministry of Tourism, RNCOS

Note: e/f = RNCOS Estimation/Forecast

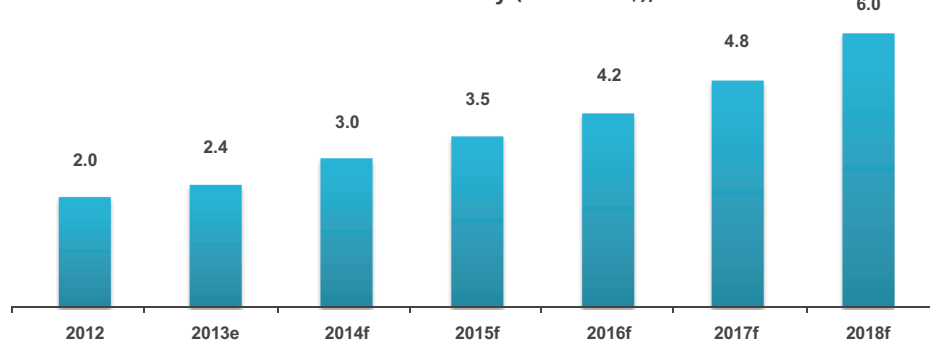
The vast pool of medical professionals, expanding private healthcare infrastructure, growing technical expertise, cheaper medical procedures, world-class healthcare infrastructure, and government support are likely to boost the number of medical tourist arrivals in India to a forecasted value of around 4 Lakh by 2018, growing at a CAGR of nearly 16% during the 6 year period cited.

It has also been observed that Indian corporate hospitals enjoy a large pool of skilled doctors, nurses, and supporting staffs. Highly-skilled doctors with relevant experience and international exposure are quite proficient in cardiology and cardiothoracic surgery; orthopedic surgery; dentistry; gastroenterology; bariatric or obesity surgery; ophthalmology; and urology. Moreover, improvements in the Indian medical infrastructure are attracting medical tourists from all over the globe.

Thus, keeping in view the above-mentioned factors, the Indian medical tourism industry is anticipated to reach a forecasted value of around US\$ 6 Billion in 2018, growing at a CAGR of nearly 20% during 2014-2018.



Indian Medical Tourism Industry (Billion US\$), 2012-2018



Source: Confederation of Indian Industry, RNCOS

Note: f = RNCOS Forecast

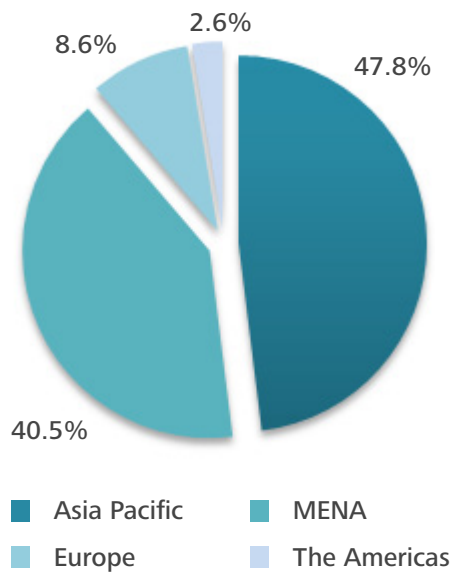
The figures correspond to the entire Indian medical tourism industry



Out of the total number of medical tourist arrivals (1.66 Lakhs) in India, the highest share was claimed by Asia Pacific region (47.8%), followed by MENA with 40.5% share. The highest contributing countries like Iraq, Kenya, Nige-

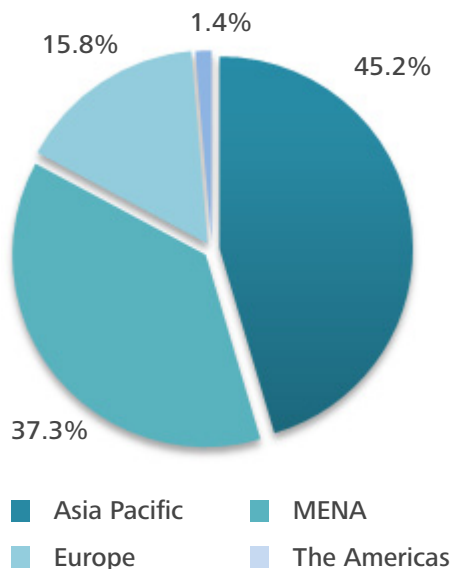
ria, Maldives, Afghanistan, Bangladesh are the ones where there's a lack of proper healthcare infrastructure and medical professionals.

Medical Tourists Arrival in India by Region (%), 2012



Source: Ministry of Tourism

Medical Tourists Arrival in India by Region (%), 2018



Source: RNCOS

In the Asia Pacific region, maximum tourists are coming from South Asia from countries like Maldives and Bangladesh, followed by South East Asia (Malaysia).

- By 2018, the share of Asia Pacific region is likely to come down to 37%, while MENA will claim the top slot with 45% share approximately. Europe's share is estimated to reach over 15% by then.
- In the Pacific region, the tourist flow from most of the countries including the top ones like Bangladesh, Maldives, Sri Lanka, Pakistan, Malaysia, Australia etc. is likely to witness further decline as the past trend suggests. Since most of these are developing regions, due to the anticipated boost in the healthcare infrastructure and stable economic conditions will lead to retention in the patients.
- In MENA regions, all the countries including Kenya, Mauritius, Nigeria, South Africa, and Afghanistan are anticipated to witness an increase in the patient outflow.
- Europe is another region which has been witnessing rapid increase in terms of medical and wellness tourists visiting India. Since the medical treatments are quite expensive and waiting time is too high, the patients, majorly from UK, Germany, and Russian Federation, are anticipated to continue the past trend line of flying to India for a surgery and indulge into the soul-full bliss of Ayurveda, Naturopathy, Yoga, etc. at wellness centers.



2.2 HEALTH & TOURISM: DEXTEROUS INDIA

JCI Accreditation: Indian hospitals, within Medical Tourism Corporation's network, are JCI accredited and highly renowned for their superior quality of healthcare. JCI accreditation ensures that the quality of medical and surgical care is at par with the American standards.

NABH Accreditation: The Indian accreditation system the National Accreditation Board for Hospitals and Healthcare Providers (NABH) come under the purview of the board of Quality Council of India. It is set up to ascertain and run an accreditation program for medical and healthcare organizations. The board is formed to take care of the needs of the patients and to set a yardstick for the progress of the Indian Health Industry. Presently, it accredits hospitals and nursing homes, and will be accrediting Diagnostic Centers, Dental Clinics, Ayurvedic Hospitals and Blood Banks, in the near future.



Accredited Healthcare Facilities in India

Accreditation	Facility	Number
JCI	Hospitals	19
NABH	Hospitals	219
	Blood Banks	60
	AYUSH Hospitals	>10
	Wellness Centers	>6

Source: NABH Website
Data as of June 2014

- **Super Specialty Hospitals:** India offers several super specialty hospitals dedicated to providing cardiology and cardiothoracic surgery, orthopedic surgery (including knee and hip replacement surgery), organ transplant surgery (including liver, kidney), Neurosurgery, Ophthalmology, Pediatric Surgery, Pediatric Neurology, Urology, Gynecology/Obstetrics/ Surrogacy, Psychiatry, General Medicine and General Surgery, Cancer management, Cosmetic treatments, and Dental care. With a gigantic boost in medical tourism, India has seen a massive upsurge in private sector hospitals that are devoted to overseas patients.
- **World Renowned Medical Professionals:** Vastly skilled, experienced and trained doctors, physicians and surgeons, of international fame and repute, perform the most complicated surgeries and procedures. Further, the doctors are supported by a strong, comprehensive and well-trained paramedical force comprising nurses, technicians, attendants, clinical co-ordinators, and nutritionists. Most of the doctors and surgeons at Indian hospitals are trained or have worked at some of the medical institutions in the US, Europe, or other developed nations.
- **Nurses:** Indian nurses are among the best in the world. Nearly 1000 recognized nurse-training centres in India, mostly attached to teaching hospitals, graduate nearly 10,000 nurses annually.



- **No Language Barrier:** Various private hospitals in India, which are expanding, have appointed language translators to make medical tourists more comfortable while at the same time supporting in the facilitation of their treatments. Most of the doctors and nurses in India are fluent in English. Language in the country is not an obstruction as a large section of people can understand and speak English.
- **Affordable and inexpensive costs of medical care services and Top Class Amenities:** The medical treatment costs are approximately 30% to 70% lower than the costs in the United States. Moreover, the state-of-the-art amenities offered by the hospitals, and the technological expertise utilized by the doctors are of world class and latest. The hospitals use first-rate and safe implants and consumables. All these factors make health tourism to India highly appealing to an overseas patient.
- **Alternative Medication:** The Indian system of medicine, which incorporates Yoga, Ayurveda, Siddha, Naturopathy, Unani, and other traditional healing treatments, has been continuously improving for the past few years and with the treatments of Ayurveda and Homeopathy gaining prominence around the world, more and more tourists are expected to visit the country. It has gained more importance in Southern India. States, such as Karnataka, Kerala, and Tamil Nadu are some of the best known places that played a key role in promoting medical tourism.

All these traditional healthcare systems are attracting national and international patients, and increasing tourism inflows. Besides these healthcare systems, there are faith/spiritual healers who are largely present in rural parts of India. Some spiritual leaders use one or more of the traditional therapies, including Ayurveda, Yoga, or Naturopathy as the healing modes to cure their patients. Such spiritual leaders are also attracting large gathering, especially international travelers from various countries.

- **A Land of Myriad Colors:** India is a country of various religions and several languages. Moreover, there are numerous archeologically and historically renowned sites spread across various states. As the strengths of India in the field of tourism are stark, the same are promoted by the 'Incredible India' Campaign run by the government of India.
- **Indian Association of Tour Operators (IATO):** IATO is the National body of the tourism industry. It has over 1500 members covering all segments of tourism industry. Established in 1982, IATO today has international acceptance, and linkages. It has close connections and constant interaction with other Tourism Associations in US, Nepal and Indonesia, where USTOA, NATO and ASITA are its member bodies; and is increasing its international networking with professional bodies for better facilitation to the International traveler visiting not only India but also the entire Asia-Pacific Region. IATO interacts closely with the Government on all critical issues affecting the Tourism Industry in India with the highest priority to Tourism facilitation.
- **Government approved Tour Operators:** The ministry of tourism has some specifications about the establishment, recognition, listing, and licensing of the tour operators. As per the pre-stated guidelines, it recognizes the tour operators.



- **India Tourism Development Corporation (ITDC):** ITDC came into existence in October 1966, and has been the prime mover in the progressive development, promotion and expansion of tourism in the country. The Corporation is running hotels, restaurants at various places for tourists, besides providing transport facilities. In addition, the Corporation is engaged in production, distribution and sale of tourist publicity literature and providing entertainment and duty free shopping facilities to the tourists. The Corporation has diversified into new avenues/innovative services like Full-Fledged Money Changer (FFMC) services, engineering related consultancy services, etc. Presently, ITDC has a network of eight Ashok Group of Hotels, six Joint Venture Hotels, 2 Restaurants (including one Airport Restaurant), 12 Transport Units, one Tourist Service Station, 37 Duty Free Shops at International as well as Domestic Customs Airports, one Tax Free outlet and two Sound and Light Shows.
- **Overseas Offices:** The Ministry of Tourism, Government of India, through its 14 offices overseas, endeavors to position India in the tourism generating markets as a preferred tourism destination, to promote various Indian tourism products vis-à-vis competition faced from various destinations and to increase India's share of the global tourism market. The specific elements of promotional efforts undertaken overseas include Advertising in the Print & Electronic Media; Participation in Fairs & Exhibitions; Organizing Seminars/Workshops/Road Shows/ & India Evenings; Printing of Brochures and Collaterals; Brochure Support/Joint Advertising with Travel Agents/Tour Operators; Inviting the Media and Travel Trade to visit the country under the Hospitality Program, etc.
- **Cooperation with International organizations:** International Co-operation Division is one of the important divisions, which engages in various consultations and negotiations with the international organizations, such as United Nations World Tourism Organization (UNWTO); Economic and Social Commission for Asia and the Pacific (ESCAP); Bay of Bengal Initiative for Multi Sectoral Technical and Economic Co-operation (BIMSTEC); Mekong-Ganga Co-operation (MGC); Association of South East Asian Nations (ASEAN) and South Asian Association for Regional Co-operation (SAARC) and South Asian Sub-regional Economic Co-operation (SASEC).

This Division holds consultations and negotiations with other countries for signing of Agreements/Memorandum of Understanding (MoU) for bilateral/multilateral cooperation in the field of tourism, organizes Joint Working Group Meetings with other countries and attends Joint Commission Meetings in coordination with the Ministries of Commerce, Culture, External Affairs, Civil Aviation, Finance, Petroleum, etc. for development and promotion of tourism.

3

M&W TOURISM ECOSYSTEM

3.1 GOVERNMENT OF INDIA

India is a “Sovereign, Socialist, Secular, Democratic Republic” with a parliamentary system of government. Geographically located in the continent of Asia (Southern part), India, the land of myriad experiences, is one of the most preferred destinations for tourism/Medical tourism. India receives several patients from Middle East, Gulf countries, African countries and other Asian regions, but the flow of patients from American and European continent is insignificant. In order to tend to this flaw, the Government of India has initiated the below mentioned processes:



3.1.1 CENTRAL GOVERNMENT

The Government of India (GoI), officially known as the Union Government, or the Central Government, was established by the Constitution of India, and is the governing authority of the union of 29 states and 7 union territories, collectively called the Republic of India. It is based in New Delhi, the capital of India. Under the central government purview, there are 51 ministries out of which 3 of External Affairs, Ministry of Tourism, and Ministry of Health & Family Welfare) are primarily concerned with the medical tourism. The ministries of along with their initiatives are listed below:

➤ Ministry of Tourism

- **Offices Overseas:** The Indian Ministry of Tourism has established offices overseas which are stocked with information for those intending to travel to India for medical treatment. The new M-visas are valid for a year and are issued for companions too.
- **Centers of Excellence:** Ministry of tourism brochures advertise cardiac surgery, minimally invasive surgery, oncology services, orthopaedics and joint replacement, and holistic health care, provided by about 45 hospitals promoted as “centres of excellence”.



MINISTRY OF TOURISM
GOVERNMENT OF INDIA



- Dedicated exhibition space for Medical Tourism in ITB, Berlin: In order to promote the positioning of India as a Medical destination and increase the presence of the medical fraternity in the international travel exhibitions, a dedicated space of 4 sq m. was provided to the medical fraternity within the India Pavillion at ITB Berlin.
- Road shows for promotion of Medical Tourism: Road shows focusing on Medical Tourism are a continuous process and are organized in consultation with the Stakeholders from time to time. The last road show was organised in West Asia (Dubai, Riyadh, Kuwait and Doha) in October 2009 which was led by the Minister of State for Tourism.
- Production of Publicity Material: Brochure, CDs and other publicity materials to promote Medical and health tourism have been produced by Ministry of Tourism and have been widely circulated for publicity in target markets.
- Fiscal Incentives Provided by Ministry of Tourism for Development of Medical Tourism: For participation in approved Medical and other Tourism Fairs/Medical Conferences/Wellness Fairs and its allied Road Shows Ministry of Tourism provides Market Development Assistance. This scheme was extended to the Medical Tourism Service Providers and Wellness Tourism Service Providers during the year 2009. Financial support under the MDA Scheme is provided to approved medical tourism service providers, i.e. representatives of Hospitals accredited by JCI and NABH and Medical Tourism facilitators (Travel Agents/Tour Operators) approved by Ministry of Tourism, Government of India and engaged in Medical Tourism.
- Guidelines for Accreditation: Ministry of Tourism has drafted guideline for wellness tourism. These guidelines address issues regarding making available quality publicity material, training and capacity building for the service providers, participation in international & domestic Wellness related events, etc. The Guideline for Accreditation of wellness centers have been developed by National Board for Accreditation of Hospitals & Healthcare Services (NABH) in consultation with AYUSH and released during the workshop on wellness tourism organized by Ministry of Tourism on 15 Feb 2011.
- The initiative of accreditation of wellness centre by NABH and AYUSH has been greatly driven by the Ministry of Tourism as also consultation with the Wellness Tourism Service Providers, State Governments and other stakeholders.

Ministry of Tourism

- Medical/MED-X Visa: The Government introduced a new kind of visa called 'Medical Visa' to foreign tourists in June, 2005. It is granted to foreigners who have sought preliminary medical advice from their country of origin/residence and have been advised to go for specialized medical treatment. The initial validity of medical visa is one year or the period of treatment, whichever is less. The treatment should be significant in nature, such as neurosurgery, heart surgery, organ transplant, joint replacement, gene therapy, and plastic surgery.
- Up to two Medical Attendant visas will be issued for people to accompany the patient Attendants/family members of patient. They shall be granted Medical Attendant visa (MED X) co-terminus with medical Visa of the patient. It can be extended for a further period of one year by the State Governments/Foreigners Regional Registration Offices (FRROs)/Foreigners Registration Offices (FROs) on production of medical certificate from reputable/recognized/specialized hospitals in India.



Further extensions can be granted by the Ministry of Home Affairs on the recommendations of the State Governments/FRROs/FROs supported by appropriate medical documents. The visa is valid for a maximum of three entries during the year. Foreigners coming to India on medical visa are required to get themselves registered with the concerned FRROs within 14 days from the date of their arrival in India.

- **Visa on Arrival:** Government of India has decided to offer visa-on-arrival to citizens of 180 countries which will be a tailwind for the medical tourism industry in the country. The extension of visa-on-arrival and electronic travel authorization to citizens of 180 countries will be implemented initially at nine airports including Delhi, Mumbai, Kolkata, Chennai, Cochin, Hyderabad, Goa and Trivandrum. In the new system tourists will be encouraged to visit an official website to apply and pay the charge before they fly. The visa will then be available for pick up at one of 26 major airports after three days. Both facilities are likely to be implemented by the end of the 2014.
- **E-Visa:** The electronic visa facility or e-visa is in its final stage of development, and is anticipated to be launched this year. The External Affairs Ministry, the National Security Advisor and all the associated agencies have unanimously supported the introduction of Electronic Travel Authorization (ETAs). Though the decision has been taken, the orders have not been issued. The implementation will take time as the software system is there but the manpower needs to be trained.

> Ministry of Health & Family Welfare



National Health Policy India is promoting medical tourism in the following way, as stated in its 2002 version: The policy encourages the supply of healthcare services to patients of foreign origin on payment. The rendering of such services on payment in foreign exchange are treated as “deemed exports”. India’s corporate hospitals are meeting the requirements of international standards, with the cost of treatment about one-eighth to one-fifth of that in the US or the UK. Therefore, many foreigners are flocking to India to get affordable and high-quality health care. Multi-specialty hospitals are getting generous incentives like free or very cheap land, tax holidays, rebates in customs tariffs, low-interest loans from public sector banks etc. in acknowledgment of their key role in revenue generation.

On the other hand, the complementary and Alternative Medicine or Traditional Medicine is rapidly growing worldwide. In India also, there is resurgence of interest in Indian Systems of Medicine. Although new treatments and technologies for dealing with healthcare issues are plentiful, nonetheless more and more patients are now looking for simpler, gentler therapies for improving the quality of life and avoiding iatrogenic problems.

India possesses an unmatched heritage represented by its ancient systems of medicine which are a treasure house of knowledge for both preventive and curative healthcare. The Government has reiterated that Ayurveda, Homoeopathy, Siddha, Unani, Yoga and Naturopathy offer a wide range of preventive, promotive and curative treatments that are both cost-effective and efficacious and there is need for ending the long neglect of these systems in Indian healthcare strategy.

Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homoeopathy (AYUSH):

Created in March 1995, Department of Indian Systems of Medicine and Homoeopathy (ISM&H) was and re-named as AYUSH in November, 2003 with an objective of providing focused attention to development of Education & Research in Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homoeopathy systems. The Department continuously upgrades AYUSH educational standards, quality control and standardization of drugs, improving the availability of medicinal plant material, research and development and awareness generation about the efficacy of the systems domestically and internationally.



Promotion of AYUSH systems at International level is in-built in the mandate of Department of AYUSH. Growing global demand of natural medicine has increased the scope of International exchange of AYUSH-related information and co-operation with other countries for collaborative efforts in the development of traditional system of medicine. A provision of Rs 25 Crores was made in the XIth plan (2007-12) for international cooperation:

- International exchange of experts & officers.
- Incentive to drug manufacturers, entrepreneurs, AYUSH institutions, etc. for international propagation of AYUSH and registration of their products by USFDA/EMEA/UK-MHRA for exports.
- Support for international market development and AYUSH promotion-related activities.
- Promotion of Ayurveda, Homoeopathy, Unani and Yoga abroad through young Post Graduates.
- Translation and publication of AYUSH books in foreign languages.
- Establishment of AYUSH information Cells/Health Centres in Indian Embassies/Missions and in the Cultural Centres set up by ICCR in foreign countries and deputation of experts.
- International Fellowship Program for foreign nationals for undertaking AYUSH courses in premier institutions in India.

After introducing the accreditation policy for AYUSH (Ayurveda, Yoga, Naturopathy, Unani, Siddha and Homeopathy) hospitals, NABH accreditation program will now be launched for AYUSH medical colleges and AYUSH products. The NABH accreditation for Indian medical colleges and products will be started by the Central Council of Indian Medicine (CCIM) with the Quality Council of India (QCI) to ensure quality products and education to students and complete governance in the Ayurvedic medical colleges.



> **National Accreditation Board for Hospitals & Healthcare Providers (NABH):**

It is a constituent board of Quality Council of India, set up to establish and operate accreditation program for healthcare organizations. The board is structured to cater to quality needs of the consumers and to set benchmarks for progress of health industry. The board has some international linkages, which are listed below:



- NABH is an Institutional Member as well as a Board member of the International Society for Quality in Health Care (ISQua).
- NABH is a member of the Accreditation Council of International Society for Quality in Health Care (ISQua).
- NABH is on board of Asian Society for Quality in Healthcare (ASQua).
- NABH accredits Hospitals, SHCO, Blood Bank, Blood Storage Centre, MIS, Dental, Facilities, OST Centre, Allopathic Clinics, AYUSH Hospitals, CHC, PHC, Wellness Centers.

3.1.2 STATE GOVERNMENTS

State governments in India are the governments ruling States of India and the chief minister heads the state government. Power is divided between central government and state governments. State government's legislature is bicameral in 6 states and unicameral in the rest. Out of the 29 states, some of the states have been taking major initiatives for promoting medical and wellness tourism which are listed below:

> **TAMIL NADU**

The Department of Tourism, Government of Tamil Nadu, in association with the hospitals has embarked on the mission of spreading the concept of Medical Tourism. This initiative is growing at exponential rate, bringing success to all players concerned by providing utmost satisfaction to the patients from diverse backgrounds. Considering the importance of Medical Tourism, below given initiatives were undertaken:



Initiatives

- Medical Tourism Information Centre has been established in the Tamil Nadu Tourism Complex.
- Travel Desks in various hospitals were set up in Chennai and Madurai.
- With the help of non-governmental enterprise, MEDITOUR INDIA and the medical organisations, a comprehensive database of all the leading hospitals in Tamil Nadu State has been prepared and linked to website.
- Capacity Building Workshops were conducted to CEOs and Front Office Managers of various Hospitals in Chennai, to sensitise them towards the rapidly growing phenomenon of Medical Tourism.
- Keeping the aspirations and apprehensions of the foreign tourists in mind, Tamil Nadu Tourism issued guidelines to various hospitals to streamline the procedures and to make the process more effective.

A Core committee has been formed, drawn from various leading medical organisations and the Directorate of Medical Education, to oversee the entire process of treatment received by the medical tourists, both from upcountry and abroad. The Core Committee held a series of meetings. The important decisions taken by the Core Committee are:

- Identified Hospitals for listing
- Co-ordinated with listed hospitals
- Published a Folder on Medical Tourism
- Opened Travel Desks at listed hospitals
- Organised capacity building training for staff manning Travel/Medical Tourism Desks in the Corporate and listed Hospitals
- Organised Seminar/Workshop

Vision 2023 envisages the setting up of two medical cities over the next 11 years. The medical cities will have comprehensive facilities to provide world class treatment at competitive rates. Given that both Tourism and Healthcare are thrust areas for Vision 2023, medical tourism at the intersection of these two industries is a natural choice for Tamil Nadu to encourage actively, both towards domestic and international visitors.

Govt. of Tamil Nadu: Vision 2023

	Projects/Programs Amount	INR (Crore)
Creation of new medical facilities	Medi-cities, medical colleges in each district, Specialty centres for geriatrics, mental health, cancer, etc.	7,900
Upgrading medical facilities	Strengthening of PHCs, Upgradation of Taluk and Non -Taluk Hospitals, Upgrading infrastructure in the existing medical colleges	1,500
Other projects Quality improvement of Public Health	Quality improvement of Public Health Institutions, Skill development, Electronic medical record facility, Laboratory/collection centres, Trauma care services etc	1,600
Total Investment		11,000

Source: Government of Tamil Nadu Website



➤ GUJARAT

Medical tourism has emerged as the most promising and fast growing sector in Gujarat. Gujarat has a full-fledged chain of hospitals at district and sub-district levels. The facilities available at these hospitals are very cost effective. There are also many super specialty hospitals with hi-tech facilities. The most modern hi-tech hospitals provide excellent facilities for cardiology, neuro-surgery, orthopedics, infertility treatment and eye surgery. Treatments in the field of dentistry and cosmetic surgery are also offered to foreign patients. The medical hospital hub of the Gujarat state is concentrated in Ahmedabad, Baroda and Surat. There are government hospitals taking care of the treatment of cases of mentally retarded, TB, leprosy and ENT. Some of the traditional hospitals like Unani, ayurveda and nature cure are also available.

Initiatives

- The most prominent city of Gujarat, Ahmedabad has earned the unique distinction of being the most prominent place for medical treatments and medical tour in the country.
- The highlight of the medical facilities is the 108 Service with the slogan 'Medical at doorstep'. The emergency ambulance service 'The 108 Service' is an ambitious project of the state and has won laurels.
- Ahmedabad has the distinction of housing the biggest civil hospital in Asia.
- The development of the treatment aids in the city is momentous and it can be attributed to the ambitious "Vibrant Gujarat" project. This project has made the hospitals in Ahmedabad to bring about drastic change in the facilities and medical aids at par with foreign countries.

Medical Tourism Policy in Gujarat

The medical tourism policy of the Gujarat government was released in December 2006. The policy stated that the government is committed to provide world class facilities to the visiting medical tourists and make Gujarat the most favored destination for people seeking medical treatments across the world. The government aims at:

- Bringing a favorable atmosphere for the medical tourist, the medical agencies, hospitals and the staff;
- Developing a medicity in Gujarat;
- Developing international standards of treatment facilities in the state;
- Safe and convenient travelling of the patients in the most affordable manner;
- Tying up with various insurance companies that would enormously benefit the foreign medical tourists. Several new packages are planned to be launched by the insurance companies to cater for the needs of patients of different diseases;
- Bringing quality assurance and hospital accreditation to make the hospitals at par with many of the international hospitals;
- The government has also signed MoU with the private hospitals to provide excellent health care facilities.



> MAHARASHTRA

Maharashtra has state-of-the-art medical facilities, hospitals and diagnostic centres, highly qualified doctors where quality treatment is provided at very low costs when compared to treatments in the international market. The state has been promoting medical tourism through MTCM and collaborating with the governments of other countries.

Initiatives

Medical Tourism Council of Maharashtra (MTCM)

- The Maharashtra government in collaboration with FICCI (Western Region Council) has launched the Medical Tourism Council of Maharashtra (MTCM).
- This council will operate as a nodal agency responsible for smooth operations in the medical-tourism sector, besides promoting Maharashtra's health-care facilities and tourism attractions in India and abroad.
- Apart from medical and para medical service providers, the hotel industry would also be an essential part of this new venture.
- A website dedicated for this project called www.mahamedtour.com was also activated at the inauguration function.
- Maharashtra-Medically Yours is the slogan coined for the promotion of MTCM.

Collaboration with South Korea

This proposal may turn into a golden handshake for South Korea and India; soon a Buddhist monastery and research centre may come up at the World Heritage Sites of Ajanta and Ellora with the help of South Korean government. In the very beginning of 2014, the Maharashtra Tourism Maharashtra Tourism has proposed the South Korean Delegation to India, to open Buddhist monastery, research centre at Ajanta Ellora.

South Korea has already partnered with Government of Maharashtra and Brihanmumbai Municipal Corporation for various infrastructure projects. Both governments are now looking at newer ties in the area of promoting tourism. Moreover, the South Korean Government has shown keen interest in the proposal and further suggested that the Medical Tourism can make a win-win situation for both countries as people in South Korea and other neighboring countries are majorly going for lifestyle treatments like plastic surgeries.

The delegation from South Korea proposed if Maharashtra can design some packages focusing on medical tourism specifically for plastic surgeries, the State may benefit a lot as the medical procedures in India are cost-effective. Maharashtra has also proposed that South Korea may promote tourism in their country through the assets of MTDC. Following the discussions, both partners will now prepare a Memorandum of Understanding (MoU) and take the proposal forward.



> KERALA

Kerala: God's Own Country; has the advantage of worldwide recognition, as it has been included in the list of the ten must-see destinations by the National Geographic Traveller. Additionally the above stated fact is complemented by the highly developed healthcare system which enables the state to attract patients from all over. It is reported that 600 to 700 foreign patients visit Kerala every month, a majority of them for ayurvedic treatment. Kerala is nearly 20% cheaper than many other States in terms of connectivity, infrastructure and specialization.

Initiatives

Medical Tourism Council of Maharashtra (MTCM)

- Kerala Tourism Development Corporation (KTDC) has tied-up with the Cochin-based Amrita Institute of Medical Sciences (AIMS); AIMS has been receiving patients from 16 countries, including European countries, with a steady increase recently in the number of patients coming down for Ayurveda. Through the joint venture it will be possible to offer the patients quality medical care at AIMS and tourism options for both the patients and their relatives through KTDC.
- KTDC opened up an Ayurvedic resort called 'Thannermukkom Ayurvedic Lake Resort' located beside the backwaters at Thannermukkom. It has tied up with the Keraleeya Ayurveda Samajam, a society formed by the Maharaja of Zamorine of Calicut in 1903, to promote and protect Ayurveda, headed by Padmasree Dr Rajagopal. The unique feature of the resort is that it provides treatment just like a fully-equipped Ayurveda hospital without reducing the leisure element by way of location, property, etc.
- Kerala, as part of its marketing strategy, continuously organizes road shows all around the world for the promotion of Ayurveda along with modern medicine. Such road shows were organized in France, Berlin and London and will be held at other destinations across the world in future.
- The state has been marketing Ayurveda at major international travel trade exhibitions and marts followed with advertising in print and electronic media.
- A PPP in the form of Kerala Travel Mart (KTM) led to the emergence of a new model of marketing with a combined effort of tourism department and tourism industry capturing the national and international markets through innovative campaigns and road shows.
- In the Tourism Policy of 2012, the state government has stated that it will devise a scheme for new investors in tour operations, homestays, serviced villas and Ayurveda centres to participate in international and national tourism promotional events for the first three years. The marketing assistance will be limited to one international fair and one domestic fair in a year. The Department will bear 25% of the travel fare and promotional materials subject to a maximum of Rs.75,000/- for international fairs and Rs.50,000/- for domestic fairs.



3.2 HOSPITALS

Hospitals are one of the major constituents of medical and wellness tourism as based on their reputation, accreditation, the facilities provided, and the profile of doctors is what that matters the most to the international tourists coming to India for medical purposes. Taking in view the same, below listed are some of the hospitals with their initiatives for catering to the medical tourists in the best way possible:



> MEDANTA-THE MEDICITY

Medanta, one of the most renowned hospitals in India, houses six centers of excellence which provide medical intelligentsia, cutting-edge technology and state-of-the-art infrastructure with a well-integrated and comprehensive information system. The hospital has a solely dedicated division for facilitating the admission, treatment, and discharge procedure for foreign patients.

Initiatives

- The hospital has devised various treatment packages tailored to suit the needs of patients from all countries, cultures, and ethnicity.
- The healthcare institution arranges for Visa Assistance, Airport Pick-n-Drop facility, and Hotel reservations, if needed.
- The international patients can 'express check-in' through the hospitals' dedicated International Patients Lounge.
- The foreign patients are offered the choice of international cuisine, international newspapers & internet access in the room.
- The hospital offers the eight super specialties and holistic treatment therapy.
- Every international patient is clubbed with a personal international care executive who provides seamless service at all stages and interactions.
- Translators/Interpreters are also there to expedite the communication process between the patient and paramedics, thus bridging the cultural void.
- The hospital also has a care management team of experienced international care nurses and a senior-level physician. This team works closely with the international care coordinator and clinical team.
- The patient coordinator assigned initially, remains one point of contact for all future communications between patient and hospital.
- The International patient services team ensures that at the time of discharge patient receives the right information/education, available translated materials, and all consolidated bills. The team also discusses and plans for the follow-up visits and future treatment needs in the patient's home country.



> APOLLO HOSPITALS

Apollo Hospitals are multi-specialty tertiary care Institutes. The hospitals offer clinical services in the fields of Cardiology, Oncology, Neurology, Nephrology, Orthopaedics, Urology, Multi-Organ Transplants, Neuro-surgery, Cosmetic Surgery, Nuclear Medicine and Emergency Medicine among others.



Initiatives

- The hospital has the JCI accreditation which international patients look for.
- The hospital provides VISA assistance and complimentary Airport Pick Up.
- Waiting time for international patients is nil.
- There's an exclusive International Patients Lounge (IPL) for international patients. Services at the IPL include: Complimentary Airport transfer Service, Scheduling of all medical appointments, Coordination of the admissions process, Cost estimates for treatment, Processing of medical second opinions, Booking of Hotel/ Service Apartments, Flight Arrangements & Extensions/Visa Assistance, Personalized consultations, Provide Language Interpreters, Complementary meals for attendant, Locker Facility, Special dietary needs/ religious arrangements, Foreign Exchange, Local sight-seeing/Tourism related Arrangements, Remote Consultations via Telemedicine, Providing news, medical updates and information to patient's relatives back home.
- One Guest Relation Officer is assigned to every international patient, facilitating their requirements.
- The hospital also has tie-ups with various insurance companies for easy payments.
- Apollo also has tied up with reputed five-star hotels, boutique hotels, service apartments, guest houses and leading travel companies to facilitate smooth travel and stay arrangements comfortable for International patients.
- It tied-up with SITA roughly a decade ago, and launched a jointly developed project, Sita Care, which markets hospitals packages abroad.



> FORTIS ESCORTS HEART INSTITUTE

Apollo Hospitals are multi-specialty tertiary care Institutes. The hospitals offer clinical services in the fields of Cardiology, Oncology, Neurology, Nephrology, Orthopaedics, Urology, Multi-Organ Transplants, Neuro-surgery, Cosmetic Surgery, Nuclear Medicine and Emergency Medicine among others.



Initiatives

- The hospital is JCI and NABH (Blood Bank) accredited.
- The institution has a tie-up with Fiji government for Congenital Heart Disease treatment.
- Fortis Escorts has several partners including, medical facilitators and other institutions.
- Hospital promotes itself in foreign countries through OPD camps, surgical camps, and other general marketing activities.
- The institution has a counter at the airport.



> WOCKHARDT HOSPITAL

Wockhardt Hospital is one of the premier multi specialty hospitals at par with international hospitals in terms of the technology, medical expertise, patient care, quality & more. Wockhardt is one of the favorite destinations for medical tourists coming to India. Some of the key features attracting patients to the hospital include:

Initiatives

- Separate section to take care of the International Patients and to make their stay comfortable.
- It is also the first super specialty hospital in Asia to be JCI accredited.
- Wockhardt is recognized by the American Blue Cross Blue Shield network.
- The hospital has agreement with Partners Medical International, Boston, USA.
- Wockhardt Hospitals has partnerships with over 100 corporate and more than 40 Third Party Administrators (TPA).

3.3 MEDICAL TOURISM FACILITATORS



A medical facilitator is a company which works as a liaison source for medical tourists, as it has tie-ups with hospitals, transportation agencies, and hospitality chains/resorts/guest houses. Over the last few, several such companies have popped up, most donning names synonymous with health and travel. They function much like a travel agency, requesting and obtaining passports, booking flights, and arranging a medical tourism patient's lodging, transportation and tours.

The key difference, of course, is that they also serve as the liaison or mediator between the patient and the international hospital and doctor. In effect, it is the facilitator's job to re-package the medical provider's service offering, make it more appealing, and then guide international patients along the medical tourism process.

They know the suitable destinations and hospitals/clinics to find the treatment which the patient wants at the best possible price. Moreover, medical tourism facilitators can get access to special deals and discounts not available to the public. Also, they have better access; since they increase the footfall in the associated institutions, they can get priority when booking hospitals/clinics, hotels and flights. Furthermore, they deal with every aspect of a medical tourist's trip. As medical tourism facilitators tend to work on a commission basis, with the clinics, hotels and airlines, which by default transfers some percentage of benefit in terms of cost to the consumers as well.

Medical tourism facilitators have played an important role in promoting the growth of medical tourism, and for many medical tourism patients, represent their first face-to-face contact with the concept of medical tourism. Considering these as one of the major components of the medical tourism industry, some of the initiatives are listed herein:

> SAHARA MEDICAL TOURISM (SAHARA CARE-SAHARA INDIA PARIWAR)

Established in 1978, Sahara India Pariwar is one of India's largest business conglomerates, with diversified business interests including Tourism and Hospitality; and Hospital. Sahara Care House (SCH) is a single window E-commerce platform of Sahara India, offering over 10,000 products and 100 services to resident and Non Resident Indians. The house offers services in the field of Medical Tourism through the dedicated team of professionals. As part of Medical Tourism portfolio, the house has formed an alliance with various national and International accredited hospitals which are integrated healthcare organizations.





Initiatives

- The house has established information centers across almost 15 countries including the US, Canada, UK, UAE, and Iraq among others.
- It has tie-up with major hospitals, but not with hospitality chains. They arrange for nearby guest houses/resorts for patients' attendants.
- Most of the patients received are from African countries, Bangladesh, and Nepal.
- They have interpreters for catering to the language issues.
- The house promotes itself abroad through medical education and OPD camps.
- It is also working on the tie-ups with international airlines.
- They persistently keep in touch with all the embassies for routing patients.
- Sahara Care is also working on the tie-ups with foreign government.
- The officials added the fact that they face Visa issues, like for some countries including Bangladesh, Afghanistan, etc. the government is reluctant.
- They suggested that the visa procedure should be smooth and a regulatory body/association should come up to safeguard the interest of all the stake holders.

> BONANZA MEDICAL TOURISM (BONANZA PORTFOLIO LTD.)

Bonanza Medical Tourism, a part of Bonanza House established in 1994, has forayed the medical tourism industry roughly 1.5 yrs, back. Company's Case Management team works to understand the medical needs of patients and reserve all the necessities involved in treatment. The separate travel desk designs custom tour packages for healing patients, taking care of their travel and accommodation needs. The division has tie-ups with Multi-Specialty Hospitals, which provide secondary and tertiary healthcare to patients.

Initiatives

- The division is highly focused on intensive online marketing.
- Most of the patients received are from African/Gulf (middle east) countries.
- Majority of the patients come for oncology, cardiology and cosmetic procedures.
- The division has partnership with hospitals and resorts.
- It does not come across Visa problems as it is handled by its hospital partners.
- As of now, the company is not promoting medical tourism by any other means, for they are ardently going for online marketing campaigns.
- For future they are planning to utilize the Bonanza Portfolio Ltd. offices abroad, for promoting medical tourism.
- The division officials cribbed on the part that government of India is taking tourism very seriously but not medical tourism.
- They don't have any patient channeling through government.



➤ **MEDI ASSIST CARE (HOLIDAYS TO TREASURE)**

MediAssist is an endeavor of 'Holidays to Treasure'. The company is run by the professionals having over two decades of experience in medicine and hospitality industry. The company provides for Guest Relations officers and Nurses managers, free Interpreters, VISA/FRRO assistance, travel assistance, meals, etc. All the services are designed keeping in mind the patients' needs and comforts.

Initiatives

- Medi Assist has two separate divisions: Medical and non-Medical. The non-medical division arranges for stay/sight-seeing/fooding/cabs and other travelling amenities.
- The company tries to provide Skype consultation in most of the cases.
- It has major hospitals empanelled.
- Mediassist also has tie-ups with renowned specialists in USA, UK and Canada in a second opinion for diagnosis and treatment plans is needed.
- They receive maximum patients from Afghan, Iraq, Congo, Nigeria, Bangladesh.
- The company opts for promotion in those countries where they have some links.
- They setup OPD/specialized OPD camps by sending Neurologists, Orthopedics, Gynaecologist to foreign countries.
- Medi Assist has local partners abroad for promotion on TV, Radio, newspapers.
- The company goes for overseas camps but not very frequently as they are expensive and have a lengthy procedure.
- The officials of the company complained that government is not at all helping; no funding is there for assisting companies like Medi Assist.
- Moreover, there's no regulation to curb the mal practices in the respective domain.
- They suggested that a regulatory body/association must come up for facilitating the industry initiatives.

➤ **MEDIESCAPES INDIA**

Mediescapes India was founded in 2005, and is an international patient advocacy and medical value travel company in India that offers a range of surgical as well as non-surgical treatment services to international patients with a promise that India as a medical tourism destination will meet patient's specific expectations to travel and get patient's medical problems settled. The company has tie-ups with major hospitals across India and has tie-ups with guest houses/hotel chains/services apartments, etc., thereby catering to the lodging and fooding requirements of the international patients.

Initiatives

- Their mode of promotion is primarily based on referrals and online marketing.
- They have referrals through doctors as well.
- The major share of patients come from African countries, Uzbekistan, North America and Canada.
- The company has tie-ups with institutions abroad who promote the Mediescapes.
- They also conduct OPD camps outside India.
- The officials suggested that the FRRO process should be waived off, for patients are already coming on MED-X visa.
- Also, they suggested that uniformity should be brought in the prices for medical treatments across hospitals.



3.4 WELLNESS CENTERS

The concept of the wellness centers has gained rapid popularity over the past few years. It's a broad term which is used widely at venues, such as medical centers, clinics, spas and nutrition offices. There are many different types of wellness centers, which cater to a variety of people and offer a plethora of treatments. The services offered by a wellness center are to promote better health through physical, psychological, or spiritual therapies, or possibly a combination of all three with a holistic focus on the mind, body and spirit. A holistic wellness center usually addresses each aspect of an individual rather than just one dimension. Many centers are based on a holistic philosophy which emphasizes a preventative approach to disease and illness.

The people seeking wellness have vast variety of options to choose from nutrition counseling, fitness classes, mental health guidance, physical treatments, or medical services at such centers. As healthcare costs continue to rise, the popularity of the wellness centers and preventative health strategies are projected to increase further. Most wellness centers are dedicated to promoting education and guidance to empower patients and clients live a healthy lifestyle. The services and therapies which might be offered at a particular wellness center will differ depending on the center. The treatments offered may include:



- Nutrition and Health Counseling
- Massage Therapy
- Chiropractic Medicine
- Naturopathic Medicine
- Fitness Classes
- Yoga
- Hypnotherapy
- Ayurveda Medicine
- Herbal Remedies
- Homeopathy
- Acupuncture/Acupressure
- Energy Healing Such As Reiki
- Stress Management
- Reflexology
- Healthy Cooking Classes
- Meditation

Wellness centers/spas are a crucial segment in the medical and wellness tourism. Some of the centers are world renowned for the treatment and facilities they offer. A few of those with their promotional initiatives are listed below:

> **SOUKYA- DR MATHAI'S INTERNATIONAL HOLISTIC HEALTH CENTRE**

SOUKYA is located on a beautifully cultivated land in the countryside east of Bangalore. Nine major structures are built around an oval, the centre of which is filled with lawns, flowers, trees and a symbolic Open Portal that encourages an open heart, mind and soul. These nine buildings – the medical centre, the administrative centre, the yoga hall, the therapy centre, the dining hall, and the four residential clusters are all built in the South Indian traditional style. The center offers all a wide range of treatments including Ayurveda and Pancha-karma; Homeopathy; Naturopathy; Yoga; Wellness; and Medical treatments.



The promotional activities of the holistic center include:

- Tying up with travel agents
- Online booking
- Take part in international exhibitions/conferences
- Most of the patients come from European countries like UK, Germany, etc.
- The basic wellness packages start from 7 nights and may go up to maximum 28 nights



> **ANANDA SPA- IN THE HIMALAYAS**

Located in the tranquil Himalayan foothills, close to the mythological cities of Haridwar and Rishikesh, surrounded by graceful Sal forests, overlooking the peaceful Ganga as it meanders into the distance, Ananda spa is the gateway to the union of body, mind and soul. The spa offers traditional Indian wellness regimes of Ayurveda, Yoga and Vedanta combined with best of International Wellness Experiences. The regimen of treatments offered by the center include; Ayurveda, Yoga, Vedanta, Naturopathy, and Spa.

The promotional activities of the spa include:

- Promotions outside India through PR agents
- Participation in international conferences/exhibition
- Conducting road shows
- Tie-ups with travel agents
- They get maximum patients from Russia, UK, US, Germany, Saudi Arabia etc.
- The basic wellness packages starts from 5 nights and goes maximum up to 21 nights
- General spa and short duration stays range from 2-3 days



> SHREYAS RETREAT

Spread across sprawling oasis of greenery, surrounded by water bodies and organic gardens, Shreyas is dedicated to promoting the authentic spiritual tradition of Yoga in a holistic manner, and is recognized as one of the finest Yoga retreats in the world. At Shreyas, Yoga is taught in traditional ashram style (daily yoga, meditation sessions, chanting classes, a strict vegetarian, no alcohol policy and community service), the guests live in a luxuriously comfortable and peaceful environment, thereby communing with nature and benefit from its healing power, simplicity, indulgence and enlightenment. The treatments offered include Yoga, Aryurveda, Naturopathy, Massages Spa, and Beauty Treatments.



The promotional activities of the center include:

- Promotion is mostly done through the website itself
- Referrals are encouraged
- Tie-ups with travel agents in India and abroad
- They a lot of articles published in the magazines, newspapers, websites in various countries
- Most of the patients come from UK, Germany, US, etc.
- The basic spa and wellness packages start at 5 nights and may go up to 21 nights maximum



> KALARI KOVILAKOM PALACE

Kalari Kovilakom Palace is located in the old princely capital town of Kollengode in the foothills of the Annamalai range, Kerala. It is the Palace for Ayurveda, offering a deep healing, a doorway to the union of the mind, body and spirit. The treatment/ facilities offered include Ayurveda, Yoga and Pranayama, and Kalaripayattu-Kerala's ancient martial art.

The promotional activities of the center include:

- Promotion through the website/referrals
- Tie-ups with travel agents
- A vast majority of the patients come from US, UK, and other European countries
- The basic wellness packages start at 5-7 nights and may go up to 28 nights maximum

4

INDUSTRY DYNAMICS

4.1 THE GOLDEN PARACHUTE: OPPORTUNITIES TO CAPTURE

- **Creation of New Jobs & Revenue Generation**

All the associated industries like medical/wellness, hospitality, tourism, retail, transport etc. all are likely to benefit from the medical tourism. It'll not only create copious job/work opportunities at different strata, but will also contribute heavily in terms of revenues. For instance, when a medical tourist is coming to India, it is always accompanied with a couple of people. Moreover, apart from getting treated, they also go for tours, shopping, enjoying delicacies etc. All these factors expedite the revenue generation for the industries incumbent to medical tourism.

- **Healthier GDP & Positive Impact on Current Account Deficit (CAD)**

When there's an obvious boost in the medical tourism industry, the GDP will also reflect the same. Infusion of the revenue thus generated will tailwind the growth trajectory of the Indian economy. India has been struggling with CAD i.e. imports exceeding exports, for quite a long time. But with the increase in number of tourists flocking to India for receiving medical/wellness treatments, the deficit gap could be bridged. India's National Health Policy says: "To capitalize on the comparative cost advantage enjoyed by domestic health facilities in the secondary and tertiary sector, the policy will encourage the supply of services to patients of foreign origin on payment. The rendering of such services on payment in foreign exchange will be treated as 'deemed exports' and will be made eligible for all fiscal incentives extended to export earnings. Thus with exports overriding imports will certainly curtail the deficit.

- **Government Hospitals & Capitalization on their Credibility**

As of now, government hospitals are not capitalizing on their expertise and richness in terms of facilities and the skilled medical professionals. Although world renowned institutions like AIIMS are already benefitting on their credibility, but there's a lack of value addition. None of the government hospitals is having an International Patients Division for catering specifically to the foreign nationals. So like major private hospitals, government hospitals too should create separate division for international patients. This will not only enhance their credibility, but will also offer additional value to the patients.





4.2 ISSUES: GROWTH HINDERING FACTORS

- **Negative Notion about the Country and Poor Personal Experiences:**

Over the past couple of years, the explosion in the number of molestation/harassment cases against women/international tourists; terrorist activities; political unrest etc. have created a very dark atmosphere, which in turn is discouraging the inflow of tourists as a whole, let alone the medical tourists. Inadequate security measures add more negativity to the foreigners' perception about India.

Moreover, poor visitor experience, particularly, due to inadequate infrastructural facilities, poor hygienic conditions and incidents of touting and harassment of tourists in some places are factors that contribute to poor visitor experience. Some of the hospitals do lag behind in providing the hygienic medical facilities and room services including hygienic food to the patient, as a result Indian hospitals are losing trust of foreign patients.



- **Lack of Hierarchy and No Devoted International Patients' Division in Government Hospitals:**

The public healthcare system of India is overburdened. The very fact itself is limiting the government from allocating generous resources for the development of medical tourism from the presidium perspective. Leaving a handful, most of the government hospitals are not at all fit for catering to the need of foreign medical tourists. The government sector hospitals don't promote medical tourism zealously. Moreover, the hierarchy is lacking there. No such managerial/administrative posts exist. This has led to impuissance in terms of work and patient management. In a government hospital, doctors and nurses are the sole contact points. Improper administration and co-ordination issues create a lot of hassle and trouble for an Indian patient, let alone the international ones.

On the other hand, every private hospital ardently involved in catering to the international patients has a separate division for such patients, while in government hospitals no such division exists. For instance, in AIIMS international patients are coming but they are visiting the hospital only because of its reputation and the skilled manpower. They are not receiving anything additional/no value addition is there.

- **Lack of Visibility, Tie-Ups and Partnerships:**

Herein the visibility denotes the efforts for promoting medical and wellness tourism in the country, particularly from the governments' end. Government does promote the tourism ardently, but rarely a conference or seminar is conducted by specifically for medical and wellness tourism. Moreover, no stalls or kiosks are put in exhibitions or other events for spreading awareness about medical/wellness tourism.

Indian Government does not have specific tie-ups with the governments of other countries for routing medical tourists. Moreover, as the government hospitals don't encourage medical tourism, they don't have hospitality/medical facilitator/tour operator partners. All such factors hinder the promotion of India as a lucrative medical tourism destination. Government hospitals also don't have specifically designed treatment packages for international patients, suiting their requirements.



- **Non-Existence of a Dedicated Web Resource and Marred Interoperability:**

One of the biggest factors retarding the industry growth in today's era of web/internet/cloud computing is the fact that Indian government has not devised and developed a fully dedicated website for medical tourism, where PAN India public/private hospitals, tour operators, medical facilitators are listed with all their specialties and best of the doctors. As of now, a foreign resident has to go hospital by hospital surfing their websites and then deciding how to go about the medical treatment they are looking to avail in India.

In India, there's a stark lack of interoperability. For instance, if a medical patient got treated at one hospital for an ailment and he/she wants to switch to another hospital for another ailment, then the underlying procedure of document preparation, transfer, billing, shifting, etc. is in itself a challenge. This is basically because not all the hospitals have implemented computerized systems like Hospital management Information System (HIMS) and associated software packages in their administrative framework.

- **No Regulation/Accreditation of Medical Facilitators:**

There's a stark lack of regulation from the government's end. Also, there's no body for accrediting the medical tourism facilitators. Some tour operators/medical facilitators do cater to the international patients in a plausible manner, but some are either fake or are extremely unscrupulous in extending the facilities. Such negative elements are only concerned with the money component; they are not at all concerned about the country's reputation as a whole.

- **Complex Visa Procedure & Permission to Stay:**

The process of attaining an Indian medical visa is quite tedious and time consuming. The very fact itself acts as a limiting factor. A medical category visa may be issued with the following conditions:

- The Indian missions/posts abroad may scrutinize the medical documents very carefully and satisfy themselves about the bonafide purpose for which medical treatment visa is being requested.
- Mission may satisfy that the applicant has sought preliminary medical advice from his country of origin/country of residence and he has been advised to go for specialized medical treatment. In case the foreign national desires to go for treatment under the Indian system of Medicines, his case may also be considered.
- This type of visa should be granted for seeking medical attendance only in reputed/ recognized specialized hospitals/treatment centers in the country. Although non-exhaustive, following illustrative list of ailments would be of primary consideration; serious ailments like neuro-surgery; ophthalmic disorders; heart related problems; renal disorders; organ transplantations; plastic surgery; joint replacement, etc. The basic idea would be that the mission may satisfy about the need of the foreign national to come to India for medical treatment/health enhancements.





- **Validity of visa and extension of visa**

The initial period for such a visa may be up to a period of one year or the period of treatment whichever less, which can be extended for a further period up to one year by the State Government/ FRROs on the production of medical certificate/advice from the reputed/recognized/specialized hospitals in the country. Any further extension will be granted by the Ministry of Home Affairs only on the recommendations of the State Government/FRROs supported by appropriate Medical documents. Such visa will be valid for maximum three entries during one year. State Government/FRROs may permit one additional entry in emergent situation if required.

- **Registration**

Foreigners coming on 'M visa' will be required to get themselves registered mandatorily well within the period of 14 days of arrival with the concerned FRROs/ FROs

- **Visa to attendant/family members**

Attendant/family members of the patient coming to India for medical treatment shall be granted miscellaneous visa co-terminus with the 'M Visa' of the patient. Such visa may be granted the spouse/children or those who have blood relations with the patient. However, not more than two attendants may be allowed at a time for grant of miscellaneous visa. Such visa will be called 'MX visa'. Such foreigners are also required to get themselves registered with the local FRROs/ FROs well within 14 days from the date of arrival.

- **Tax Implications:**

Another hindering reason is application of high taxes. A tourist has to spend a lot of money on availing the tourism related services because a sales tax levied on these services is two-fold higher than any other developed country. In its union budget 2011-2012, government has increased service tax on airfares which is making air travelling expensive. In the same way independent restaurants have been brought under the service tax net for being air-conditioned, in a country where temperatures soar up to 40–45 °C.

4.3 CAPTURING THE OPPORTUNITIES: THE ROAD AHEAD

- **Curtailing the Negative Elements:**



The government, the citizens, the nation as a whole must act and subdue the black cloud surrounding India in terms of political unrests, religious/regional instability, heinous crimes, molestation/harassment of girls/foreigners/tourists, cleanliness, and the hygienic conditions. We must come together and fight the going negative notions hampering the growth of India, including the medical and wellness tourism industry.

- **Revamp of Government Hospitals and Creation of International Patients Division:**

At first place the government hospitals need a revamp and complete makeover in terms of infrastructure, instruments, facilities, labs, etc. so that the patient burden is reduced as well as more and more resources could be allocated for wooing medical tourists. Government must encourage the hospitals under its purview to establish a dedicated department for international patients, catering to their specific cultural and medical needs. Accepted the fact that institutions like AIIMS, Safdarjung, Maulana Azad Medical College, etc. capitalize on their skills and international repute, but why not make the best of such skills and increase the international patient flow by offering them certain amenities which can make their experience transcending. Moreover, the government must capitalize on the best of medical skills. The government must highlight the specialties and best doctors for every hospital, and then as a '*Centre of Excellence*' the hospitals should be promoted for certain treatment/procedures.

- **Creating Synergies through Tie-Ups and Partnerships:**

The government of India must expedite the process of establishing MoUs with the governments of other countries, which in turn, can facilitate the flow of international medical tourists. For instance, recently Maharashtra Government has suggested the South Korean delegation to setup a monastery and research center nearby Ellora caves. The delegation from South Korea proposed if Maharashtra can design some packages focusing on medical tourism specifically for plastic surgeries hinting that such kind of arrangement will make a win-win situation for both the countries. The government should also make arrangement for tying-up hospitals with tour operators/medical facilitators in order to smoothen the process of travelling and availing a medical treatment along with some sight-seeing. So, it is suggested that the Indian government must focus on such tie-ups/agreements.

Initiatives should be taken to establish synergies between hospitals and tour operators. As of now only a couple of hospitals have tie-ups with leading names in the tour and travel industry like Apollo hospital with SITA (SITACARE). So, such kinships, which add more weight to the services provided hereunder, should be encouraged and promoted in order to facilitate the industry growth.



- **Designing a Industry-Special Web Portal and Facilitating Interoperability:**



The government of India must design and optimize a web portal/website inclined specifically towards medical and wellness tourism, where all the public/private hospitals, wellness and rejuvenation facilities, spas, alternative therapy centers, tour operators, medical facilitators are listed with all their specialties. Moreover, the profiles of the best of specialists/ doctors/paramedics/alternative therapy providers should be placed on the respective portal so that the patients/wellness tourists can seek all the required information thereon, and plan their visit accordingly.

There's a dire need to address the lack of interoperability across medical institutions. The government and private sector must come forward and hasten the process of HIMIS incorporation in PAN India hospitals in order to smoothen the whole procedure and establish more clarity in terms of

interoperability. With the implementation of HIMIS modules like LIS, PIS, PACS, etc. the procedure of data management, data transfer and information sharing across hospitals PAN India will become hassle-free, which in turn, will prove to be icing on the medical/wellness tourism industry.

- **Setting up a Regulatory Body/Association for Accreditation of Medical Facilitators:**

In order to keep a check on the unscrupulous elements operating in the medical and wellness tourism industry, and to curb the malpractices, the government must establish a regulatory body for governing the operations of the participating companies. Also, some association/accreditation body, just like IATO/NABH should be established particularly for medical facilitators so as to ensure the quality of the services and gaining the trust factor by stamping the organizations with a relevant accreditation or affiliating it with an apex body.

- **Elicit our Presence through Seminars/Conferences:**

Just like private sector, the government must encourage/offer funding/incentives to the government hospitals for setting up stalls/Setting up Stalls/Booth/Kiosks at healthcare related events/exhibitions happening abroad/in-house. This will expedite the process spreading awareness about the kind of facilities available at government hospitals, and what sort of packages are available for patients who are planning to visit India for medical reasons.

Furthermore, the government should conduct seminars/conferences and invite insignias from embassies, hospitals, tour agencies/medical facilitators, thus creating a common forum for discussion on how to capitalize on the strengths of India in the healthcare sector, tackle the existing challenges, make the country more lucrative for medical tourism, and for spreading the word about medical/wellness tourism itself.

5

PREPPING UP INDIA:

THE BOULEVARD AHEAD

The below-mentioned are the summarized propositions for what should be done in order to pave a smooth path for India to achieve top-notch position in the global medical tourism industry. These propositions are broadly drawn from the discussions with several stakeholders and after understanding the initiatives of other countries for promoting medical tourism.

Government

- Regulation: The presidium of India must come forward as a regulator to facilitate the health tourism industry growth and promote the industry as a whole. It should issue a mandate for hospitals/medical facilitators/tour operators/wellness centers to get themselves graded/accredited so as to build consumers' trust.
- Establishing National Level Bodies: In order to create awareness about 'Brand India' abroad and woo higher number of health tourists, a national body (Indian Association for Medical & Wellness Tourism (IAMWT)) should be established on the lines of Indian Association of Tour Operators (IATO). Such an association will not only ensure the qualitative prospect of health tourism in India, but also expedite the procedure of addressing the issues and market the Indian excellence in healthcare, abroad.
- Foreign direct investment (FDI): The government should zealously encourage FDI in healthcare sector, also devising favorable fiscal policies, such as low interest rate loans for healthcare operators, curtailing import/excise duty levied on medical equipment, etc.
- Facilitating Medical Visa Process: A simplified route for applying/getting/extending medical visas should be developed in order to make travel across borders smoother.





- **Tie-ups:** The State government should enter into tie-ups with individual countries to attract medical tourists from countries in East Africa, GCC, SAARC, etc. Special emphasis should also be given on language skills to attract more visitors from the African continent, Europe and West Asia.
- **Dedicated Web Resource:** A purely dedicated web portal inclined specifically towards medical and wellness tourism must be designed and optimized, where all the public/private hospitals, wellness and rejuvenation facilities, spas, alternative therapy centers, tour operators, medical facilitators are listed with all their specialties.
- **Security:** The government must ensure that the negativity associated with the country in terms of harassment/molestation/political instability/other crimes must be subdued and managed by any means. The security of international tourists is the foremost concern.
- **FRRO Exemption:** Since the patients are already coming on medical visa, the need to register in the FRRO is insignificant. Moreover, it's cumbersome for a patient already suffering from an ailment, to come and register themselves at FRRO.
- **Visa Exemption:** Although it would be a concern from security point of view, but to some countries the facility of visa exemption for a month or 2 could be forwarded.
- **Privacy:** The privacy maintenance for a patient in India is a big challenge, especially if the patient is high profile VVIP or Bollywood star. So, this part must be handled carefully.

Hospitals & Wellness Centers

- **Collaboration between Hospitals and Wellness Centers:** The hospitals and wellness centers must collaborate in order to promote not just the medical treatments, but the holistic healing of mind, body and soul;
- **Setting-up Holistic Wellness Centers within the Hospitals:** Most of the private/corporate hospitals are now setting up alternative therapy centers within the premises. This not only increases the revenue source, but also gives a lucrative option to the patients and their attendants to benefit from the rejuvenation center at the hospital itself rather than going to a different place. The same approach should be followed by the government hospitals as well in order to attract medical/wellness tourists.
- **Value Addition:** Some additional services should be offered to the patients. For instance, hospitals and wellness centers should set-up kiosks at airports, offer airport pickups, bank transactions, or tie-ups with airlines for tickets and may help facilitate medical visas by the government. With more Arab patients coming in, some hospitals may have hired Arabic interpreters, stocked up on prayer rugs and opened up a kitchen serving the food preparations in corporate hospitals in India.
- **Strategic Alliances:** To tackle the stifling competition in the medical tourism industry, hospitals and wellness centers of India should tie-up with foreign institutions for assured routing of medical tourists.
- **Price Uniformity:** The hospitals must bring price uniformity across their chains. As of now, the price varies heavily across the centers of the same hospital.

Medical Facilitators

- **Special Packages:** The medical facilitators should design packages that include air travel, hotel accommodation, surgery, and wellness therapy expenses, claiming savings.
- **Joint Operation:** The facilitators should focus on joint operations in order to facilitate travel for medical and wellness services.
- **Testimonials on the Website:** Textual and video testimonies of treated foreign patients and administrators describing the excellence of the treatment, the low cost, the professional approach, and the technical expertise in facilitation should be put on the website of medical facilitators.





About RNCOS

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