

Advantage Gujarat in Medical Tourism

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Gujarat: A Global Health Destination

In tune with the national goal to promote India as the most favored Medical tourism destination, Gujarat has aggressively adopted the concept into tourism promotion using Vibrant Gujarat. As part of its Navratri Celebrations, Vibrant Gujarat, the Government of Gujarat took the opportunity to promote its world-class medical facilities and medical expertise making Gujarat as a destination for medical tourism for Non Resident Indians specifically Non Resident Gujaratis' NRIs and NRGs are coming to Gujarat for treatment which is estimated to be contributing 25-31 % of the industry earnings of one hundred thousand crores. The Gujarati community comprises of 32% of the total 20.1 million people of Indian origin worldwide. Gujarat's medical expertise and the strength of its facilities are better than those of some of the south-east Asian nations and Gujarat hospitals are working lot harder selling abroad. Government and Private Healthcare organization have come together to attract patients from abroad with measures such as:

- Creating centre of excellences in the respective fields
- Quality stamp through accreditation from global certification agencies such as JCI
- Developing a network for promotion about availability of Customized Packages
- Moving from the word of mouth marketing strategy to direct marketing
- Promotions on Indian Systems of Medicine specifically, Ayurveda, Naturopathy and Yoga are also a part of the package.

Government planning for medical tourism ahead

The Government of Gujarat has realized the advantage it has through the large number of Gujarati population overseas. Harnessing this resource - Gujarat a Global Health Destination is being initiated. The long-term plans of which include:-

- Establishing a Medical tourism council
- M.O.U.s with private hospitals for provision of high quality health care. Introduction of Nursing Home Act
- Accreditation of service providers so that quality services are assured.
- Medicity : Opportunities for private participation in public hospitals

Investments in infrastructure and quality management, Gujarat government claimed that a growth of 33 percent has been registered in the number of medical tourist in the state while the country has registered growth of 20 percent in year 2006-07. One of the objectives is to develop a Medicity in Gujarat. Under the policy the government will help insurance companies develop different packages of international standard. The policy also envisages world-class medical facilities with public participation. It will also set up standards of hospital accreditation and entrepreneurs in the field of medical tourism.

Health tourism being the new mantra that State Government wants to promote and in keeping with this unique selling proposition (USP), the Health and Family and Welfare Department released a advertisement booklet — Gujarat Medicare Tourism — listing medicare facilities, including that of alternative medicine, available in the State. These booklets will be sent to various embassies for distribution among tourists. This is the first time a State Government has taken such a direct marketing initiative. Names of prominent hospitals named in the booklet are from Ahmedabad, Vadodara, Rajkot and Jamnagar as centre of excellence in the field of specific medical practices. Private hospitals and clinics, on their part, are making individual efforts to woo foreigners and NRIs.

Attempt has been made in this paper to understand the ground work being done by Government and private healthcare sectors to tap the potential of Medical Tourism and how Gujarat is in an advantageous position



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to benefit from the endeavor. Secondary sources of information - literature search covering print as well as soft copy publications has been used as information input sources

Prologue

What is tourism?

Tourism defined as "the sum of the phenomena and relationships arising from the travel and stay of non-residents, insofar as they do not lead to permanent residence and are not connected with any earning activity." "Tourism is the temporary, short-term movement of people to destination outside the places where they normally live and work and their activities during the stay at each destination. It includes movements for all purposes."

The World Tourism Organization defines tourists as people who "travel to and stay in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited". Tourism has become a popular global leisure activity (www.wikipedia.org). The different areas of tourism include viz., Domestic Tourism; World Tourism; Historical Tourism; Cultural Tourism; Environmental Tourism; Recreational Tourism; Everest Tourism; Educational Tourism; Ethnic Tourism; Pilgrimage Tourism; Archaeological Tourism; Heritage Tourism; Wildlife Tourism; Coastal and Beach Tourism; Corporate Tourism; Adventure Tourism, Highway Tourism and the new emerging Medical Tourism.

As a contributor to the global economy, tourism industry provides opportunities like:

- Employment of over 204 million people worldwide or one in every nine workers, 10.6 percent of the global workforce.
- Is the world's leading economic contributor, producing an incredible 10.2 percent of the world's gross national product.
- Is the leading producer of tax revenues at US\$655 billion.
- Is the world's largest industry in terms of gross output approaching US\$304 trillion

Tourism accounts for 10.9 percent of all consumer spending, 10.7 percent of all capital investment and 6.9 percent of all government spending.

What is Medical tourism?

Medical tourism is one of the most recent concepts in Tourism services. An amalgamation of two distinct service types ; Healthcare and Tourism, that has a holistic appeal of catering to the needs of well being of the body through Medical services and mind through Tourism services. Medical tourism as a specific subject of study has started evolving around year 2003. Shrinking global boundaries and easier access to services and facilities as a result of Globalization coupled with simple access to Information have made the amalgamation between Tourism and Medical services happen successfully. Enormous prospect of Medical Tourism service is seriously being explored by all growing economies. Medical tourism serves two distinct need of the customer: medical service need which due to many reasons is not available locally to the customer and alongside meets the desire to see a new place. Thus we have two different sets of service providers coming together to serve the customer, one is the Medical services, essentially the Specialist doctor and hospital and the Tourism service provider. Medical tourism service have high expectation demand in which the customer is very choosy to select the best amongst several options and ensure negation of any risk because one is to put oneself at the service of Medical professionals without any compromise. The sensitivity of the customers (patients and their accompanying members) makes Medical tourism a premium service type which requires the service providers to be nothing less than the experts in their fields.

Scenario of Global Medical Tourism

Globally Medical tourism market is at US\$ 20 Billion (2005). Global competition is emerging in the health care industry. Wealthy patients from developing countries have long traveled to developed countries for high quality medical care. Now, a growing number of less-affluent patients from developed countries are traveling to regions once characterized as "third world." These patients are seeking high quality medical care at affordable prices. Reports on the number of patients traveling abroad for health care are scattered, but all tell the same story. An estimated 500,000 Americans traveled abroad for treatment in 2005. A majority traveled to Mexico and other Latin American countries; but Americans were also among the

estimated 250,000 foreign patients who sought care in Singapore, the 500,000 in India and as many as 1 million in Thailand. The cost savings for patients seeking medical care abroad can be significant.

For example:

- ✦ Apollo Hospital in New Delhi, India, charges \$4,000 for cardiac surgery, compared to about \$30,000 in the United States.
- ✦ Hospitals in Argentina, Singapore or Thailand charge \$8,000 to \$12,000 for a partial hip replacement — one-half the price charged in Europe or the United States.
- ✦ Hospitals in Singapore charge \$18,000 and hospitals in India charge only \$12,000 for a knee replacement that runs \$30,000 in the United States.
- ✦ A rhinoplasty (nose reconstruction) procedure that costs only \$850 in India would cost \$4,500 in the United States.

In 2006, the medical tourism industry grossed about \$60 billion worldwide. McKinsey & Company estimates this total will rise to \$100 billion by 2012. Patients who are not familiar with specific medical facilities abroad can coordinate their treatment through medical travel intermediaries. These services work like specialized travel agents. They investigate health care providers to ensure quality and screen customers to assess those who are physically well enough to travel. They often have doctors and nurses on staff to assess the medical efficacy of procedures and help patients select physicians and hospitals. Prices for treatment are lower in foreign hospitals for a number of reasons. Labor costs are lower, third parties (insurance and government) are less involved or not at all involved, package pricing with price transparency is normal, there are fewer attempts to shift the cost of charity care to paying patients, there are fewer regulations limiting collaborative arrangements between health care facilities and physicians, and malpractice litigation costs are lower. How can patients ensure the medical treatment they will receive will be of high quality?

- ✦ Foreign health care providers often have physicians with internationally respected credentials, many of them with training in the United States, Australia, Canada or Europe.
- ✦ More than 120 hospitals abroad are accredited by the Joint Commission International (JCI), an arm of the organization that accredits American hospitals participating in Medicare; another 20 are accredited through the International Standards Organization; and some countries are adopting their own accrediting standards.
- ✦ Some foreign hospitals are owned, managed or affiliated with prestigious American universities or health care systems such as the Cleveland Clinic and Johns Hopkins International.
- ✦ Several companies are building and operating hospitals in Mexico that meet American standards, largely for American (and wealthy Mexican) patients.
- ✦ Finally, patients can also use online communities to get information on the safety and quality of medical providers by reading the testimonies of other patients who have had surgery abroad.

Medical tourism is only one aspect of the way globalization is changing the U.S. health care system. Apart from patient travel, many medical tasks can be outsourced to skilled professionals abroad when the physical presence of a physician is unnecessary. This can include interpretation of diagnostic tests and long-distance international collaboration, particularly in case management and disease management programs, because of the availability of information technology. (www.ncpa.org/pub/st/st304)

Scenario of Medical Tourism in India

India is one amongst the strong contenders in fray to attract people across the globe not just for the purpose to see it's heritage sites but also use it's services in healthcare which has gained repute due to availability of skilled medical professionals. India, considered one of the leading medical tourism providers, attracted five-lakh foreign medical tourists in 2006. Revenues total \$350 million and the annual growth rate for such services was 30%. Many people from the developed world come to India for the rejuvenation promised by Yoga and Ayurvedic and other traditional Indian medicine. A nice blend of top-class medical expertise at attractive prices and prompt services is helping a growing number of Indian corporate hospitals attract foreign patients, including people from developed nations such as the UK and the US. As more and more patients from Europe, the US and other affluent nations with high medical costs and long waiting time to get medical treatment are looking for effective options. India is pitted against Thailand, Singapore and

other Asian countries, which have good hospitals, salubrious climate and tourist destinations. While Thailand and Singapore with their advanced medical facilities and built-in medical tourism options have been drawing foreign patients since some time now, the rapidly expanding Indian corporate hospital sector has been able to make an impression in the market recently. Medical tourism has been allocated one of the most important growth engines in the healthcare sector, and has got a boost after Union Tourism ministry announced that a total investment of \$6.5 billion is in pipeline for medical tourism industry in the country. The amount will be used for setting up affordable hospitals and budget hotels for patients and their relatives in the country. The announcement assumes importance as Indian private hospitals are increasingly finding a mention in the travel itineraries of foreigners, with the trend of medical tourism catching up in the country. According to industry estimates, the size of the medical tourism industry stands at Rs 1,200-1,500 crore. Currently Indian healthcare market is at Rs 15 billion and growing at over 30% every year. RNCOS' report "Opportunities in Medical Tourism in India (2007)" provides extensive research and objective analysis on the Medical Tourism industry in India. This report has been written to help clients in analyzing the opportunities critical to the growth of Medical tourism market in India. Detailed data and analysis will help investors to comprehend the changing dynamics of the Healthcare industry. As medical tourism looks set to expand further, India must make use of the opportunity while ensuring that it does not create a health divide.

Medical Tourism in India: The opportunities

It is a fact that neo-liberal economic reforms have resulted in India surging ahead with promise in Medical Tourism, in spite of lacunae in its public health policy implementation. India's tertiary healthcare sector is on the road to global fame. A growing number of spotlessly clean private hospitals are on the threshold of a boom in medical tourism, positioning themselves as the best destinations for procedures ranging from coronary bypasses to orthopaedic surgery at the most affordable costs. These hospitals offer high-quality care for international patients, whose numbers are reportedly rising 15 per cent annually; the prices that they charge are a fraction of what prevails in the developed world. India's corporate hospitals are fully equipped, up market and efficient. With their toll-free helplines, interactive websites, online quotes and time-bound treatment access, they appear to be a world apart from the overburdened, often badly managed and poorly funded public health system.

Just three major corporate hospital groups, Fortis Healthcare, Wockhardt and Apollo Hospitals run 26 hospitals in the subcontinent and that number is growing. They are forming partnerships with international insurance and tourism companies that will send both insured and uninsured patients for low cost treatment. With some friendly policies from the Government, some analysts think, the private healthcare sector can transform the potential of medical tourism into a very profitable reality. One oft-cited report that endorses this optimistic outlook is "Healthcare in India: The Road Ahead", produced by the Confederation of Indian Industry and McKinsey and Company. It puts a number to the promise: tertiary hospitals, with a 25 per cent growth rate in revenues from foreign patients (comparable to institutions such as Bumrungrad in Thailand), could generate additional earnings of Rs. 5,000 crore to Rs. 10,000 crore by 2012. That potential is based, in part, on the low cost of care in international price terms, competent medical personnel and absence of long waiting times for procedures, says the report.

Stories of foreign nationals undergoing complicated surgery in the country are frequently featured in the media. Those who come now are not just from other developing countries (the first lady of Guyana brought a group of 15 patients for cardiac treatment to Frontier Lifeline hospital in Chennai), but also from the United Kingdom, Europe and North America. Tanzania and Iraq have a Memorandum of Understanding with the Madras Medical Mission.

Many opt to undergo surgery in India for reasons that range from long waiting times in the U.K., high costs or lack of insurance cover in the U.S., to plain lack of expertise in many Asian, African and West Asian countries.

The CII-McKinsey report says that the allopathic system can offer treatment in specialties such as cardiac, liver, renal and orthopedic procedures, while Indian systems of medicine could attract patients from even the developed world to treat "lifestyle diseases" such as stress and rheumatism. Many visitors who come for such de-stressing and health-building treatment may also choose to visit tourist spots. Such tourism potential holds the key to Kerala's plans. The Ayurveda State has declared 2006 the year of Medical Tourism and is actively supporting its well-known traditional medicine and tourism sectors, as they reach out to more potential visitors.

Elsewhere, development plans, both State-led and in the private sector are being pursued actively: Karnataka, which gets about 8,000 patients a year and forecasts an annual growth rate of 25 per cent, will promote a massive health park near a new international airport in Bangalore; non-resident Indians have formed a medical tourism company in Vadodara, Gujarat and international property developers are venturing into the healthcare sector to participate in the construction boom. In Maharashtra, the State Government is part of the Medical Tourism Council that has members from Association of Hospitals and FICCI.

In New Delhi, the Escorts Heart Institute and Research Centre has proposed a Medicity on the outskirts of the capital to develop a 1,500-bed healthcare centre of international standards with 20 super specialties. It will incorporate traditional medicine too and have such facilities as hotels, serviced apartments, clinical and biotechnology laboratories.

Private hospitals in Hyderabad, some of which get 10 per cent of their patients from abroad, are planning to open separate wards or wings for foreigners. The Apollo Hospitals already has a ward and wants to upgrade it to an international multi-specialty block while the Asian Institute of Gastroenterology plans to create a separate wing for foreigners.

The key to a significant increase in patient arrivals, however, lies in becoming globally accredited. Corporate hospitals have begun factoring this requirement into their medical tourism plans. Joint Commission International, a benchmarking body lists Indraprastha Apollo, New Delhi, and Wockhardt, Mumbai, as accredited hospitals. Accreditation apparently brings immediate benefits. “There has been a steady increase in the number of patients over the last six to eight months, particularly from the U.K. and U.S. The numbers have been increasing after accreditation, particularly from the U.S.

The biggest disincentive to medical tourism, the hospitals say, is the insensitive handling of visa issuance to those who come for treatment. While people-to-people relations are strengthened when a patient from Pakistan, Iraq or Afghanistan gets operated upon in India, the requirement that visitors must report to designated officials periodically is viewed as avoidable harassment.

The corporate hospitals have not failed to recognize the opportunity. Many of them are upgrading to offer the latest medical diagnostic facilities to medical tourists, which may also be packaged with vacations in a tie-up with airline companies. But as corporate hospitals open their doors to a greater number of medical tourists, some analysts believe that the impact of this phenomenon on national healthcare needs careful study. Some observers fear an exodus of highly skilled doctors from the atrophied public health system to high paying private hospitals. Many States are not even ready to fill vacancies in government medical service, compounding the problem

The size of the Indian medical tourism sector is thought to be about 1,00,000 to 1,50,000 patients a year. The Indian Healthcare Federation, a consortium of non-governmental hospitals, diagnostic centers, medical equipment manufacturers and pharmaceutical industries says about 1,00,000 foreign patients are coming to the country, up from 10,000 five years ago.

The CII-McKinsey report estimates that the annualized growth of the medical tourism market was about 30 per cent in 2000, up from 15 per cent in the five previous years. The growth has been limited, the study says, since foreign patients represent only a fraction of total patients handled by individual hospitals.

CII-McKinsey forecasts up market private care in India to be worth anywhere from Rs.15,000 crore to Rs.30,000 crore by 2012 and medical tourism can potentially raise that by Rs.5,000 crore to Rs.10,000 crore. Medical tourism represents 25 per cent of revenues of private up market care in this estimate and three to five per cent of the total delivery market.

Table 1: A comparative picture of costs and waiting time to access some crucial medical treatments in India vis a vis USA and UK

Nature of Treatment	Approximate Cost in India (\$) *	Cost in other Major Healthcare Destination (\$) *	Approximate Waiting Periods in USA / UK (in months)
Open heart Surgery	Save over 50%	> 18,000	9 – 11
Cranio-facial Surgery and skull base	Save over 50%	> 13,000	6 - 8
Neuro-surgery with Hypothermia	Save over 50%	> 21,000	12 - 14
Complex spine surgery with implants	Save over 50%	> 13,000	9 – 11

Simple Spine surgery	Save over 50%	> 6,500	9 – 11
Simple Brain Tumor -Biopsy -Surgery	Save over 50%	>4,300 > 10,000	6 - 8
Parkinsons -Lesion -DBS	Save over 50%	>6,500 > 26,000	9 – 11
Hip Replacement	Save over 50%	> 13,000	9 – 11

Source: The Hindu

Medical Tourism in India : The Challenges and concerns India is still a developing country and has several inherent problems. There is a negative perception about the country because of poor hygiene and sanitation. No uniformity of quality and accreditation is now becoming a reality

Medical insurance is still in its infancy and has a very low penetration Flight connectivity needs attention Infrastructural woes continue to affect the airports, roads and power Save for the initiatives taken by a few organized players, there has been no focused marketing till now The knowledge about medical tourism is mostly shared by word-of- mouth or by persons who are internet savvy Patients from developed countries are still skeptical of the quality of medical care abroad, and doubly skeptical of ventures that have no personal or local contacts

Continuity in health care is a major cause for concern. There are many stories on the internet about the people who opted for treatment abroad, but returned home without follow-up care and suffering complications

Patients from developed countries know that they have legal recourse to medical malpractice for healthcare in their countries. This is often not true of procedures that take place overseas, and are not under their legal jurisdiction

Quality in capital letters, the process of accreditation will provide a new thrust to the medical value tourism. Apart from eyeing the coveted Joint Commission International (JCI) accreditation, hospitals are also eyeing the National Accreditation Board for Hospitals and Healthcare Providers (NABH) accreditation. These standards are expected to raise the standard in healthcare, set benchmarks and create a level-playing field at the global level.

NABH accreditation will provide a fillip to inbound medical tourism and also showcase to the world India's healthcare standards. Indeed, as more foreign patients go down on the quality route, the defining parameter in healthcare will be accreditation — JCI or NABH — which will help dispel much of the concern in the international community about the standards of India's private healthcare. Singapore and Abu Dhabi have made it mandatory for all hospitals to have JCI accreditation. That's the way to go for Indian hospitals too if they want to join the action building around medical tourism. Shortfall of skilled doctors and medical professionals is a challenge that India has to handle at the earliest. Number of doctors per 10,000 people in India varies between 10-15 on an average, while the same in the developed nations stand at minimum 100.

Gujarat: A Global Health Destination -A short review of the milieu



Gujarat is located in the western coast of India. While the southern part of Gujarat runs along the Arabian sea, it's northern region houses the Thar desert. Positioned at an easily accessible location it carries a deep backdrop of historical and prehistoric era locales of specific interest. Gujarat has a population of about 5.08 crores, and has been showing a new direction to the nation during the last 43 years, specifically in the industry front. With just 5 per cent of the India's total population and 6 per cent of geographical area, Gujarat contributes to 16 per cent of the country's total investment, 10 per cent of expenditure, 16 per cent

of exports and 30 per cent of stock market capitalization. The state's annual growth rate has been 10 to 12 per cent for the last five years. As per the Centre for Monitoring Indian Economy (CMIE) figures, Gujarat stands first in industrialization in India. Projects worth Rs. 33,958 crore are under implementation. Some of the most significant achievements for Gujarat are :

- Leader in various industrial sectors, Chemicals, Petrochemicals, Drugs & Pharmaceuticals, Dairy, Cement & Ceramics, Textiles, Engineering and Gems & Jewellery.
- Gujarat's State Domestic Product (SDP) rising at an average growth rate of 12.4% per annum in real terms (from 1994-2002).
- Gujarat achieved as much as 35% of augmentation in its power generation capacity during the period 1995-96 and 2000-2001.
- Three LNG terminals to come up.
- Gas grid system in operation.
- Gujarat in fact is one of the first few states in India to have encouraged private sector investment in the infrastructure.
- Gujarat accounts for almost 21% share in the export basket of India.
- Longest coastline of 1600 kms, dotted with 41 ports, 1 major, 11 intermediate and 29 minor ports.
- Country's first private sector ports, Pipavav and Mundra, are already in operation. In addition, the liquid cargo (chemicals) handling port at Dahej is also set up in joint sector and made operational.
- Excellent road network – exceeding 74000 kms. The Ahmedabad-Baroda Expressway in Gujarat is now open for transportation.
- Highest number of Airports in India – 11 including an international airport in Ahmedabad.
- An extensive rail network connecting all major centers in the state.
- Largest producer of Salt and Soda Ash in the country.
- Largest grass-root Petroleum Refinery in the world operational at Jamnagar.
- Network of quality educational institutions.
- Government supported strong Tourism movement in the guise of Vibrant Gujarat.
- Inclusion of specific plan and policies to boost Medical tourism in Gujarat using the Vibrant Gujarat banner by the Gujarat Government.
- Business-friendly environment and rich heritage of entrepreneurial skill

Medical Tourism in Gujarat

Medical facilities in Gujarat is well advanced with world class health facilities, zero waiting time and most importantly one tenth of medical costs spent in the US or UK, Gujarat is evolving into a preferred medical tourist destination. According to a rough estimate, about 1,200 to 1,500 NRI's, NRG's and a small percentage of foreigners come every year for different medical treatments, the majority being cardiac patients and a good number of patients coming for joint replacement, plastic surgery and In-vitro fertilization. The medical tourism is increasing at a very fast rate and it is being pursued by a strong vision of the Medical professionals and the Government.

The state has various advantages and the large NRG population living in the UK and USA is one of the major ones. Out of the 20 million-plus Indians spread across the globe, Gujarati's boasts 6 million, which is around 30 per cent of the total NRI population. Non resident Gujaratis or popularly known as NRG's coming to India for personal and medical visits are also marketing the health services available in the state. The specialized clinics and hospitals especially in the private sector is gaining popularity through word of mouth, and this is contributing to the inflow of medical tourists. Among the other advantages are the highly qualified specialists in the field of Ophthalmology, Urology, Embryology, Orthodontics, Oncology and Orthopedics. The facilities and equipment available at the hospitals are comparable with the best hospitals in the country and even the world. All this is due to the strong economic level in the state. In the services front Medical tourism in Gujarat comes in a package combining medical treatment and tourism services. Apart from low cost and best world class medical facilities, the hospitals are offering pick and drop services, ambulance services etc. Such health facilities are attracting the patients from Africa, America and the UK where waiting the standard period is between 6 to 18 months.

Apollo Hospitals, Ahmedabad receives high number of foreign tourists for all types of surgeries and health checkups. People are now aware of the health facilities being provided in Gujarat and knowledge of English language is another major advantage, along with a zero waiting period. The major factor for

increasing medical tourists to the state is the low costs for cardiac surgery, angiography, joint replacements, radiation and other medical services, which are one tenth of the costs incurred abroad. For instance, joint replacement costs 1.25 to 1.50 lakhs in Gujarat and the same surgery is done for \$20,000 in America. Similarly a cardiac surgery is done for \$4000 in our state and the same is done for \$ 25,000 in the US. Similarly In-Vitro Fertilization costs one-fifth in Gujarat when compared to the USA.

Medical tourism is a recent concept in India and Gujarat has been able to match world standards in almost all areas of treatment. Until recently the capital city, Delhi, ruled as the commercial capital along with Mumbai as the most preferred medical tourist destinations. Specialized medical treatment for Cancer, in Ahmedabad’s Medical Cancer & Research Institute receive lot of inquiries from foreign countries specially from NRI’s who cannot afford high costs of treatment or lack sufficient medical facilities like Uganda, Chicago, Nigeria, and the Middle East. The costs are almost 1/20th of the costs incurred in the USA or UK.”

Medical tourism in Gujarat: The opportunities

Some of the key growth facilitators for Advantage Gujarat are:

- Zero waiting periods for all patient either requiring emergency treatment or otherwise
- One tenth to one twentieth of the costs involved for medical treatment in USA or UK
- Specialized hospitals and clinics
- Gujarati doctors participating in world medical conferences help them to know about the latest developments in the medical field.
- Knowledge of English language
- Large percentage of NRG's among NRI's
- Direct air connectivity between Ahmedabad and London
- Well connected with the base metros like Delhi and Mumbai
- Good roads and infrastructure compared to other states of India

Table 2 : Cost comparison - major medical costs between India and USA / UK (in US dollars)

Treatment	USA / UK(\$)	India (Gujarat)(\$)
Cardiac Surgery	20000- 40000	4000 -8000
CT Scan	1200	50
Cornea Transplant	18000 – 20000	800 - 1500
Joint Replacement	17000 – 20000	3300
Angiography	3000	300
IVF	5000	1500
Root Canal	600-700	33

Source : www.ideagujarat.com

Looking at the increasing medical tourists the state government has announced a medical tourism policy 2006, which will be helpful for providing better health care facilities and give exposure to the medical fraternity. The policy is also expected to give a lot of revenue to the government. Under this policy a 'Medicity' is also being set up which will provide all types of health facilities in one complex namely Allopathic, Homeopathy, Yoga, Ayurveda, nature therapy and other alternative therapies.

Not just medicines, now doctors from the State believe that public relations will give that extra 'edge' to their profession. Medical tourism formed a vital component of the 'Tourism Year' observed in year 2006, and as cash-rich Gujarati NRIs fly home for medical treatment, doctors and hospitals are wooing them with packages, including deluxe accommodation and even English-speaking cab drivers. Doctors are organizing sight-seeing itineraries and beauty treatments for the patients, in addition to giving them attractive discounts for treatment. Along with the guarantee of excellent treatment, they also enjoy the homecoming. November, December and January — also known as the NRI season here. Here are some excerpts on individual efforts contributing to Medical tourism in Gujarat

- Having caught global attention following her success with surrogate mothers, Anand-based infertility specialist Dr Nayna Patel ensures that her NRI patients are as comfortable as they can be. Right from tying up with leading chain hotels to do up their apartments, to hiring public relations officers to take the couple sight-seeing, everything is taken care of by her team. Temporary residential facilities in a local apartment, tying up with five-star hotels for the best facilities and for patients who are not well-

- versed with Gujarati or Hindi, an escort is provided to help them with shopping. Specific customized services like arranging for an English speaking taxi driver, etc are also done.
- Sterling-Unity Hospital in Vadodara, have three health packages especially for NRIs. Depending on the kind of check-up and package, the hospital also offers them rebates or free service on some tests.
 - With a bulk of NRI patients preferring Indian hospitals for cosmetic surgery, there are interesting trade-offs, too. Dr Samir Rawal, an Anand-based plastic surgeon, was promised free advertisement in US-based community newspapers for providing good service and treatment to an NRI patient.
 - Dr Chaitanya Buch from Vadodara, who launched a special NRI clinic recently, is offering NRIs a family health package. This enables the patient's parents or relatives to avail themselves of free treatment. Moreover, elderly family members of NRI patients are given periodical tests, if necessary, and the details are sent to NRIs via e-mail. Dr Mahendra Dhopte, Vadodara-based dermatovenerologist, apart from offering cosmetic surgery, also has full-time beautician to give tips as well as beauty treatments to patients.
 - Apollo Hospitals across the country have tied up with travel companies to attract NRIs as well as international patients. According to the arrangement, the treatment is clubbed with travel packages for holiday, family reunion or festive occasions.
 - Nearly 15 per cent of patients at Krishna Heart and Super-specialty Institute at Ghuma village near Ahmedabad are NRIs.
 - In Surat, mostly private practitioners net the patients. General practitioners as well as doctors practicing ophthalmology and dentistry get a lot of NRI patients as they can get their check-ups and minor operations done without a long waiting period.

Corporate hospitals are coming up, bringing with them newer technology, and wooing NRI patients with promise on quality and services. While Ahmedabad and Vadodara are cashing in on this trend, Rajkot lags far behind. Though the city offers a majority of medical facilities, the hospitals here have failed to conform to international standards. But things may soon change with a big pharmaceutical group like Wockhardt setting up a hospital here. Speculations about Apollo setting up a hospital here are also doing the rounds. As these plans materialize, Rajkot will also get on the medical tourism bandwagon.

To ensure that its Destination Gujarat for NRIs and NRGs when it comes to medical tourism, the State Cabinet approved a new Gujarat Medical Tourism Policy. The aim of the policy: health services of international standards and at reasonable costs to patients who fly down to State for treatment, Under the Medical Tourism Policy-2006, private entrepreneurs will be invited to set up 'Medicity' and 'Healthcare Park' for upgrading medical facilities here. Besides this, a state-of-the-art School of Medicine complex will be set up where research activities will be carried out. The complex will be affiliated to a 2000-bed capacity hospital,

The Cabinet has also given its nod to setting up of a Gujarat Medical Tourism Council. (www.Expressindia.com) .Some of the measures that it is taking include reduction in Entertainment Tax from 55 per cent to 25 re cent, reduction and restructuring of luxury tax and reduction of Value Added Tax on F&B from 12.50 per cent to 4 per cent. There is also an enhancement in the budget allocation for the tourism industry from Rs. 30 to 100 crore with a provision of Rs 60 crore for infrastructure and basic facilities.

Gujarat government has Medical Tourism Policy which will be implemented by Gujarat Medical Tourism Council. The policy is aimed at making Gujarat ultimate destination for people seeking medical facility world over. Gujarat boasts of growth of 33 percent registered in the number of medical tourist in the state while the country has registered growth of 20 percent.

The policy also envisages world-class medical facilities with public participation. It will also set up standards of hospital accreditation and entrepreneurs in the field of medical tourism. The state health ministry has begun planning NABH certification for its hospitals as the first serious step to enhance Medical tourism.

In the medicity a hospital of 2000 bed and a school of medicine has also been planned. Chief Minister will be the Chief patron of the council and it will be headed by Health and Family Welfare Minister

Available Medical Facilities in Gujarat : Most sought-after Super-Specialties: Cardiology, Neuro-Surgery, Infertility treatment, Orthopedics, Eye Surgery, Dental treatment and Cosmetic Surgery

» Gujarat offers holistic medicinal service and cost effective treatment through various Districts Hospitals, Sub-districts Hospitals and Private Specialty Hospitals.

» The most sought-after super-specialties in Gujarat include cardiology, neuro-Surgery, orthopedics,

infertility treatment and eye surgery.

- » Other services such as dental treatment and cosmetic surgery are also offered to international patients.
- » Most of the Private Specialty Hospitals in Gujarat are located in Ahmedabad, Surat and Baroda.
- » In addition, there are state-run hospitals for TB, Mental illness and Leprosy across the state.
- » Traditional therapies such as yoga and ayurveda also available
- » Multi-specialty hospitals with modern infrastructure
- » MoUs signed with private hospitals for providing high-quality healthcare

A combination of many factors including state of the art infrastructure, corporate set ups, mediclaim and cashless facilities, well-trained and educated staff, latest and most modern technological link-ups and easy and rapid modes of communication with link-ups to most countries has led to availability of an array of medical tourism influx in Gujarat. Alongside of all these, the economical and very affordable rates of medical testing and treatment has bridged the gap between availability of most modern facilities to the most common individual.

Names of Gujarat hospitals featuring amongst the Best Hospitals and Clinics in India

1. Apollo Cancer Hospital
2. SAL Hospital, Ahmedabad (S.A.L. Hospital & Medical Institute, Ahmedabad)
3. Dr. Jivraj Mehtra Hospital (Dr. Jivraj Mehta Smarak Health Foundation)
4. Sterling Hospital, Ahmedabad
5. Bhailal Amin General Hospital , Baroda, (Vadodara) India
6. Siddhi Vinayak Hospital Cancer Treatment in India
7. Gujarat Cancer Society, Ahmedabad India
8. Kailash Cancer Hospital and Research Centre, India
9. Smt. Anilaben Kantilal Kothari Cancer Chikitsha Bhawan, Rajkot India
10. UN Mehta Institute Cardiology, Ahmedabad
11. Krishna Heart and Super Specialty Institute Ahmedabad, India
12. Baroda Heart Institute & Research Centre Baroda, India
13. Eye Research Centre and Retina Foundation, Ahmedabad
14. Advance Fertility and Endoscopic Centre, Ahmedabad
15. Shalby Orthopaedic Hospital & Research Centre Ahmedabad
16. Gujarat Ayurved University, Dr Paneri's - Ayurvedic Treatment India specialize in Parkinson Treatment
17. Hair Loss Treatment, Hair Treatment, Baldness Treatment India: Dr Mahadevia's Hair Clinic

Health tourism is the prime focus for the State Government and it wants to promote it with an unique selling proposition (USP, the Health and Family and Welfare Department — Gujarat Medicare Tourism — listing medical facilities, including that of alternative medicine, available in the State. These booklets are to be sent to various embassies for distribution among tourists. This is the first time a State Government has taken such an initiative. Alternative forms of medical facilities provided by Ayurveda, homeopathy, acupressure, massage and yoga too have been discussed in the booklet which also gives information of the approximate cost of these facilities.

Private hospitals, on their part, are making individual efforts to woo foreigners and NRIs. Apollo has entered into an agreement with Vedic India, a private company with a large patient client base from abroad. Serious marketing steps taken up have begun confidence-boosting changes, like improved hygiene, are part of a new government strategy to attract one million additional medical tourists to India by 2010, according to the news reports. India is also promoting its low-cost medical treatments to travel agencies. At the World Travel Market held in London in November, India's tourism ministry for the first time brought along hospital representatives and dedicated 32 of its 212 stalls to the health care industry. Even though annual check-ups, hip replacements, liver transplants and other procedures in India typically cost just one-tenth to one-fifth of the price paid in Western countries, medical tourism could be lucrative for India. An additional 1 million international patients could bring the country as much as two billion dollars, the government estimates.

Promising aspects about healthcare in Gujarat

- Clinical outcomes being on par with the world's best centers.

- Internationally qualified and experienced doctors.
- Technology edge.
- Competitive costs
- Quality of service.
- No waiting time.
- Patient-centric care.
- Exotic experience, increasing popularity as a tourist destination.
- Eastern healthcare wisdom along with the expertise of western medicine.
- Areas where Indian healthcare has to focus
- Accreditation norms to be adopted by all major hospitals.
- Hospitals must conform to a code of ethics.
- Provision of a uniform price band for major specialties especially for health insurance majors.
- Handling of medico-legal issues.

Some of the avenues where work is in progress and have started showing returns are :

- Accreditations of Healthcare facilities
- Overall infrastructure development
- Issuance of medical visas
- Price banding
- Policy framework for Insurance and other Medico-legal issues

Medical Tourism in Gujarat: The challenges and concerns

The path ahead for success in Medical tourism in Gujarat has impediments that deserve to be analyzed and worked upon to convert them as promises for development. Some of the biggest challenges are :

- i. Need to improve the air connectivity within and outside state
- ii. Besides need to be transparent with the medical procedure
- iii. Improve our success rate of treatments
- iv. Up gradation of basic amenities and hospital infrastructure
- v. Co-ordination between the healthcare and tourism sectors
- vi. Creating a resource pool of highly skilled and cordial manpower
- vii. Standardization of services and accreditation of hospitals
- viii. Increasing visibility of India on the world map
- ix. The impact on domestic healthcare services
- x. Scarcity of expert doctors and medical professionals

Basic amenities in Gujarat are not up to international standards, especially air connectivity, road links, conveyance services and Internet connectivity. This gives a poor image of the country to health travelers, and also raises doubts about the quality of healthcare facilities. The state of basic amenities in a country has a considerable impact on the choice of destination for health travelers. Basic amenities need to be upgraded and made hassle free.

Travel visa is another critical issue which the government plans to address by introducing special medical visas for foreign tourists coming to India for specialized treatment. This visa will allow the patient to bring along two attendants and will also enable him to access the finest medical care in the most recognized hospitals in the country, that specialize in the treatment he is seeking. Strategic co-ordination essential between these two sectors can be done through facilitation by the government. The Indian Healthcare Federation, Medical Tourism Council of Maharashtra, FICCI, government of India and respective state governments are coordinating to promote this industry. The services of both the healthcare and the tourism sector are required simultaneously once the patient finalizes the hospital from where he/she wishes to avail of the healthcare services. Arrangement for passports, visas, airline tickets and conveyance has to be made. The availability of doctor, date of surgery, days to be spent in the hospital and recuperation services have to be confirmed. All this requires co-operation from both the hospital and the tour operator. Thus there is a need to train the people of these two sectors to meet the requirements of this special segment of tourists. Conferences, interaction between the two sectors, knowledge up gradation workshops, coaching for personality development and investment in information technology are the ways to strengthen this synergy.

Creating a Resource Pool of Highly Skilled and Cordial Manpower Indian doctors are well-known abroad for their qualifications and skills.

Concluding remarks and propositions

Extensive literature review on the subject: Medical tourism, it's contemporary status in the Global, National and State (Gujarat) level have built up a strong conviction that Medical tourism is a naturally established new service which has a very promising prospect for future enhancement and growth. Advantage in Medical tourism for Gujarat primarily based on the huge non resident Gujarati population the state can boost of. Gujarati people are naturally very enterprising and have very strong business sense. This fact ensures Gujarat to be one of the most advanced and Industrialized states in India. Some of the top Industry houses in India are run by Gujarati people. 32% of the total NRIs are Gujarati and they have kept touch with their roots. They prefer to hold on their traditions and come back home for occasions and for requirements which includes availing medical services in Gujarat. The trend has been that well known doctors and hospitals catered to the needs of such patients. When the patient got cured, spread the good word of appreciation for the doctor and hospital amongst their friends and this Buzz marketing helped the doctors and hospital get more patients. Hence there are centers of excellence and expertise on specific medical specialty providing medical services to the NRG and foreign patients. Of late with the growing awareness about Medical tourism and finding that the concept works well for business development, the Medical service providers have begun tying up with tourism service providers to make lucrative packages that include local area tour and hospitality. Medical tourism stands on this level of professionalism as of now but all in the business including the Government of Gujarat is keen to move it ahead and give it an industry status with proper policies and management and thus ensure fruitful revenue results. Development work towards this direction is not just in paper under the schemes of Vibrant Gujarat – but is pursued with seriousness and zeal. Gujarat shares most of it's concerns and challenges with those seen at the national level. Palpably all the constraint towards this end can be overcome by a synergized effort of the Government and non Government Medical service providers. Given the backdrop of industrialization in Gujarat and the whole hearted effort put in by all to make the best over coming all problems, Medical tourism is poised to succeed in Gujarat – it's only a matter of time.

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