

Medical Travel

The Hybrid Future of International Healthcare

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The “frame”

- World Trade Organization (WTO) & General Agreement on Trade in Services (GATS)
- Market(s) Development – Type of Commitment (Merritt)
- From Opportunity to Sustainability
- New models

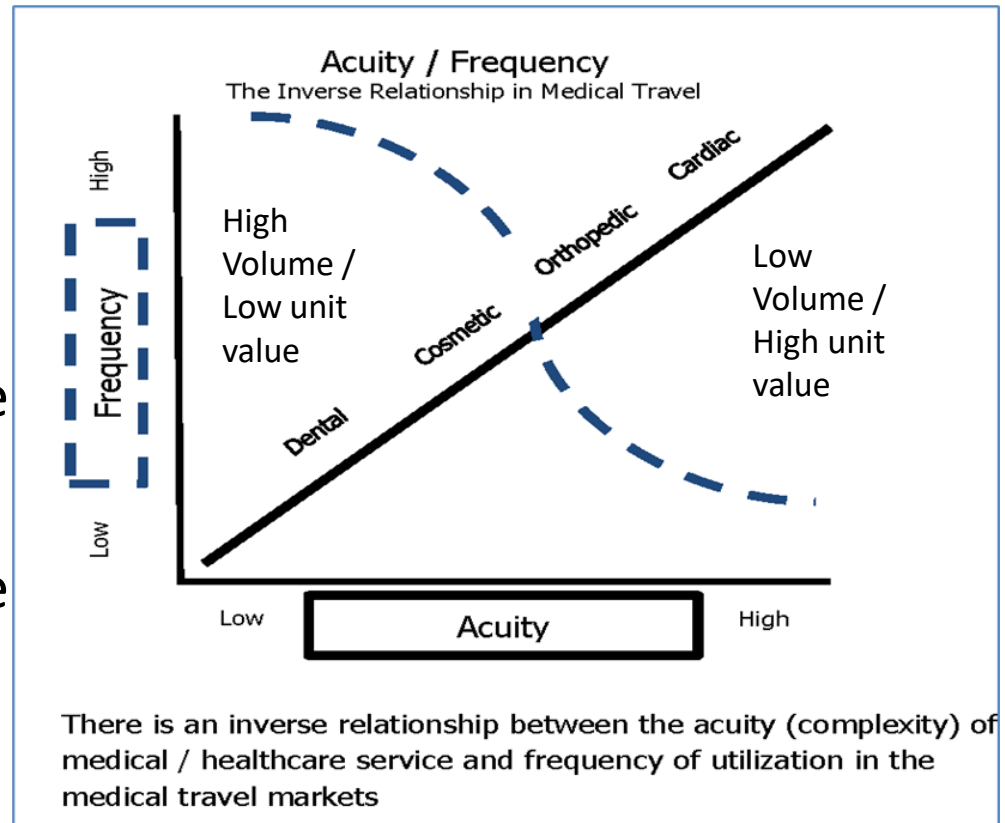
GATS

Mode	Type	Trade in healthcare	Examples
Mode 1	Cross border supply of services	Trade across borders through electronic media; shipment of materials; analysis of information	Telemedicine; Transfer of images for evaluation and analysis such as radiology, histology, cardiology, etc.
Mode 2	Consumption abroad	Care for foreign patients in a destination across a border; foreign students attending classes	Consumers traveling across borders for the express purpose of receiving treatment; students from one location traveling to another location for training
Mode 3	Commercial/operational presence	Establishment of foreign operations, subsidiaries or investment for the management or provision of health services	Providers from one country initiating services through an operating entity in another country
Mode 4	Presence of natural persons	Temporary movement or location of health professionals providing services abroad; short-term consulting assignments	Locum tenens across borders; consulting

GATS Mode 2: Health / Medical Tourism Markets

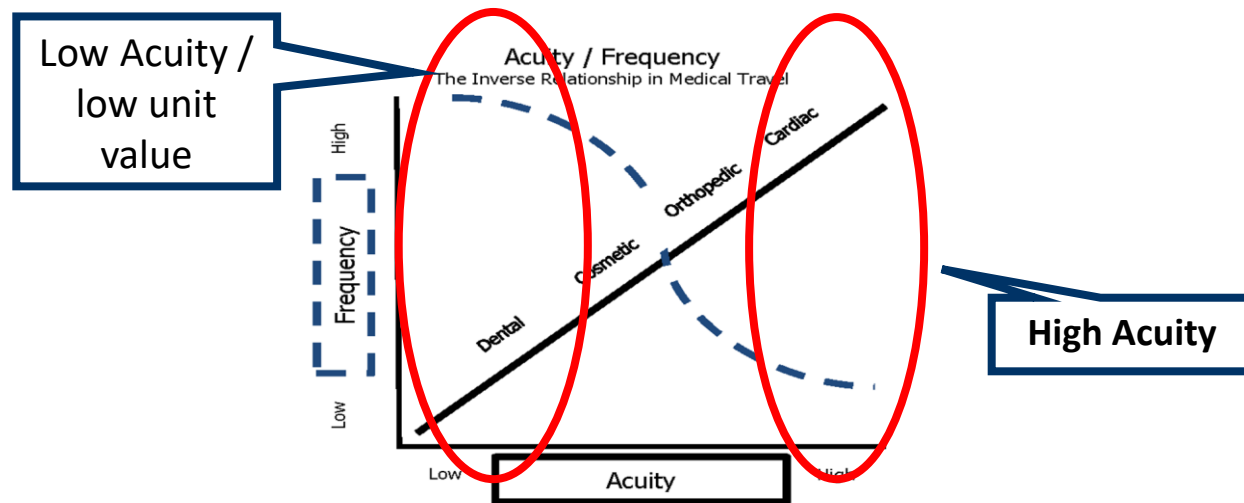
Historical Structural Limitations

- Inverse relationship:
- Acuity v. frequency
- \uparrow volume / \downarrow unit value
- \downarrow volume / \uparrow unit value



Health / Medical Tourism – The Recovery

- Traditional (Mode 2) segments returning



There is an inverse relationship between the acuity (complexity) of medical / healthcare service and frequency of utilization in the medical travel markets

Legacy of International Medical Travel Programs

- Opportunistic
- Private financing
- Limited # of partners
- ↓ complex
- Leading with strengths
- Risk averse consumers
- Leverage PPP
- Labor - leverage
- KPIs to benefit source country?
- Impact on environment?

Opportunistic → Sustainable

Sustainability:

- Repeatable
- Scalable
- Financially viable
- Deliver value for patients
- Impact on environment

From Opportunity to Sustainability

Three-legged stool (healthcare)

- Capital investment
- Knowledge & skills
- Labor

Refocus on Labor Opportunities

“The world is currently facing a shortage of around 900,000 midwives, ...” – UNFPA <https://news.un.org/en/story/2021/05/1091282>

ICN estimates that the nursing workforce alone could hit a shortfall of 13 million by 2030. https://www.icn.ch/sites/default/files/inline-files/ICN%20Policy%20Brief_Nurse%20Shortage%20and%20Retention.pdf

WHO “estimates a global shortage of 18 million health workers by 2030, mostly in low- and lower-middle-income countries, with nurses making up about half of this gap”.

<https://www.clintonhealthaccess.org/there-is-a-global-shortage-of-nurses-covid-19-is-making-it-worse/>

Research supporting the growing global role of Physician Assistants: [Social Innovations Journal](#), Vol, 8 (2021): A Healthcare Workforce Cadre that Meets a Country’s Needs.

Re-imagine: Sustainability

GATS: Four modes for services delivery

Commitment: Foreign patients; brand & reputation; education & research; financial rewards; recruit & retain professional staff.

Expand commitments to add...

Sustainable: Repeatable; Scalable; Financially viable; Deliver more value for patients in the source country; Minimize impact on environment.

Chinese Model

- PKU-iGHD
- Peking University Institute for Global Health and Development (PKU-iGHD)
- *PKU ... "aims to better integrate multi-discipline resources in public health, economic management, international relations and other related fields"*
- Modes
 - Mode 1, 3 & 4
- Commitment Type
 - Stage I, II, II & (?) IV



Conclusions

- GATS Mode 2 Exports
 - Highly vulnerable markets (geo-politics, pandemic, PPP, etc.)
- What got us here, won't get us "there"
- "There" → GATS Modes 1, 3 & 4
→ Stages I & III (*education & research*)
- Sustainable
- Labor
 - Sourcing
 - Skills
 - Deployment
- New models & competitors

Conclusions



Conclusions

- New models

General Agreement on Trade in Services (GATS): Modes & Types of Trade			
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ML / AI applications

Telemedicine; Transfer of images for evaluation and analysis such as radiology, histology, cardiology, etc.

Providers from one country initiating services through an operating entity in another country

Temporary movement or location of health professionals providing services abroad; short-term consulting assignments

Multi-national / Hybrid & Risk-bearing

Skills / Knowledge transfer through temporary assignment

Thank you!!

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