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The American University in Cairo
School of Global Affairs and Public Policy

MEDICAL TOURISM IN EGYPT: OPPORTUNITIES AND CHALLENGES

A Thesis Submitted to the Public Policy and Administration Department in partial fulfillment of
the requirements for the degree of Master of Public Administration

By

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Thesis Supervisor

Dr. Shahjahan Bhuiyan

FALL 2017

The American University in Cairo
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to the Department of Public Policy and Administration
FALL 17

In partial fulfillment of the requirements for the
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The American University in Cairo
School of Global Affairs and Public Policy
Public Policy and Administration Department

MEDICAL TOURISM IN EGYPT: OPPORTUNITIES AND CHALLENGES

Magdi Maurice Marzouk Ayoub

Supervised by Dr. Shahjahan Bhuiyan

ABSTRACT

Several developed and developing countries recognize medical tourism as a lucrative opportunity to generate national income and boost up the economy, which contribute to the overall development strategy. Although Egypt is well-positioned as tourism destination, medical tourism is lagging when compared to regional and global competitors. This thesis describes the status quo of Egypt's medical tourism, analyze the strengths, weaknesses, opportunities and threats of medical tourism industry in Egypt, and define the required policies, entities and strategic plans needed to realize the goal of having a strong and competitive medical tourism industry. The study utilizes qualitative research methods using semi-structured interviews with several stakeholders in the medical tourism industry in Egypt including those in the Ministry of Health, Egyptian Tourism Authority, healthcare providers and medical tourism facilitators as a primary source for data related to medical tourism sector in Egypt, as well as several secondary data in published literature about this topic. The study analyzed Egypt's competitive advantage of its medical tourism industry using the strengths, weaknesses, opportunities and threats (SWOT) analysis tool, based on the integrated model of medical tourism. Findings demonstrate that Egypt's medical tourism industry has a number of strengths like the existing and well developed tourism infrastructure, abundance of healthcare professionals, and the great geographical location. On the other hand weaknesses are mainly related to the absence of medical tourism governance, poor marketing, low quality of healthcare, and the non-availability of educational programs that enhance the capacity of service providers to handle this type of tourists. A set of policy recommendations had been suggested, that aim to define a comprehensive development strategy for the sector and eventually will enhance the competitive advantage of medical tourism in Egypt.

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Abbreviations and Acronyms

CAPMAS	Central Agency for Public Mobilization and Statistics
ETA	Egyptian Tourism Authority
GCC	Gulf Cooperation Council
IMTJ	International Medical Travel Journal
ISO	International Organization for Standardization
IVF	In Vitro Fertilization
JCI	Joint Commission International
MENA	Middle East, North Africa
MHTC	Malaysia Healthcare Travel Council
MoHP	Ministry of Health and Population
MoT	Ministry of Tourism
MTA	Medical Travel Agency
MTF	Medical Tourism Facilitator
NICHP	National Information Center for Health and Population
PPP	Public-Private Partnership
SCU	Supreme Council of Universities
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TAT	Tourism Authority of Thailand
TCAC	Tourism and Civil Aviation Committee
UAE	United Arab Emirates
USA	United States of America
USD	United States dollar
WHO	World Health Organization

CHAPTER ONE: INTRODUCTION

Medical tourism as its name suggests can refer to tourists who travel from a country to another in order to seek some sort of healthcare services (Lee and Spisto, 2007: 1). In the past three decades, medical tourism became a global phenomenon that attracted relevant academics to investigate into it, private sector to invest in, and governments to adopt policies for promoting medical tourism in respective countries. Historically, medical travellers were from developing countries seeking to obtain medical care in the advanced healthcare centers in the developed countries for treatments not available domestically. However, due to several factors that could include but not limited to the rapid increase of healthcare costs, long waiting times, non-covered certain medical services by the social health insurance in developed countries had paved the way for creating an alternative market that satisfy such demand. On the other hand, globalization and leap advancements in telecommunication technology have provided access to medical tourists in developed countries to loads of information about health treatments abroad.

Many developing countries like Thailand, India, Singapore, Malaysia, United Arab Emirates (UAE) and others had developed national strategic plans for enhancing and promoting their medical tourism industry. In 2016, the Indian government approved a four- point strategy to promote the industry as a part of its 2030 vision (Aweshkar, 2017). The strategy sets goals to enhance and modernize tourism, regulation, accreditation and healthcare. Medical tourism development is one of Dubai's Health Strategy for 2016 – 2021. According to the strategy, Dubai seeks to enhance the capacity of healthcare providers, update regulations and policies related to medical tourism, develop a regulatory and promotion entity for medical tourism, and

improve the medical tourism ecosystem.

The main purpose of this study is to understand the status of Egypt's medical tourism, and analyze the strengths, weaknesses, opportunities and threats of medical tourism industry in Egypt, and come up with recommendations for identifying the required policies, entities and strategic plans needed to realize the goal of having a strong and competitive medical tourism industry.

1.1. Scope of the Study

The scope of this research encompasses:

1. This study shall examine the status of medical tourism in Egypt. "Status" here means the governance of medical tourism, the quality of medical care, the ability of healthcare and tourism industries of handling this kind of tourism.
2. Assessment of the strengths, weaknesses, opportunities, and threats of medical tourism industry in Egypt using Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis with criteria based on the Integrated Model of Medical Tourism as developed by Heung, Kucukusta, and Song (2010).
3. Analyze the industry's competitive advantage based on the findings of SWOT analysis.
4. Provide relevant policy recommendations to the Egyptian government to develop a national strategic plan that aims to enhance medical tourism industry's competitive advantage, and promote it globally and regionally.

1.2. Importance of the study

Egypt is seeking to have a competitive, balanced and diversified economy, dependent on innovation and knowledge (Egypt 2030, 2017). Medical tourism is globally booming and it is time for the Egyptian government to pay attention to it. There is a dearth of research on medical tourism in Egypt. This study will help in understanding the required policies, strategies and resources needed to be allocated in order to enhance medical tourism industry in Egypt.

1.3. Research Questions

1. What is the current status of medical tourism in Egypt?
2. What are the strengths, weaknesses, opportunities and threats of medical tourism industry in Egypt?
3. What are the required policies, entities and strategic plans needed to realize the goal of having a strong and competitive medical tourism industry?

CHAPTER TWO: LITERATURE REVIEW

This chapter presents the literature gathered on the issue of medical tourism. Medical tourism is explained in details including different definitions of medical tourism, component of medical tourism, medical tourism destinations, a review of determinant factors that defines competitive advantage, and the challenges that occur when a country wants to become the well-known medical tourism destination and attract patients from around the world.

2.1. The Concept of Medical Tourism

There is no consensus for a definition for medical tourism, academic literature, international publications and various business reports each has its own definition. One definition states that medical tourism is a concept that refers to a “travel activity that involves a medical procedure or to activities that promote the wellbeing of the tourist” (Lee and Spisto, 2007: 1). In other words, it is going abroad for obtaining medical services in other country. Academic scholars such as Lunt and Carrera propose different definition – “organized travel outside one’s natural health care jurisdiction for the enhancement or restoration of the individual’s health through medical intervention” (Carrera and Bridges 2006). In this definition, the researchers not only referred medical tourism, but also to the medical tourists who are driven by the forces such as economy, political and social life (Horowitz et al. 2007).

Medical tourist is the consumer of medical tourism services, a patient travelling outside her or his own country borders by her or his own or with the assistance of a travel agency or what so called medical tourism facilitators to receive medical intervention, which could

diagnosis, non-invasive, invasive, pharmacological, or rehabilitation in a healthcare facility (Lunt et al., 2011). Medical tourism generally implies that there is a tour operator involved, organizing the whole trip and offering both medical and non-medical services. The literature is not clear if expatriates and conventional tourists getting medical care during their stay in the destination country could be considered medical tourists. As a researcher, I believe that expatriates and conventional tourists should not be included in the medical tourism population for two reasons. First, including expatriates and conventional tourists in the medical tourism population shall give a false positive indication of the real size of medical tourism. Second, an integral part of the medical tourism experience is the prior planning of medical care. If medical care was not planned in the origin country, we cannot classify this patient as a medical tourist.

The modern concept of medical tourism was initially recognized by Europeans in the 1980s. Since then, medical tourism grabbed the attention of academic healthcare and tourism researchers. Numerous factors contributed to the exponential growth of medical tourism (Connell, 2006). In USA, the increase in healthcare costs and millions of uninsured patients. In European countries that have socialized healthcare, long waiting time to have a surgery, or sometime to get a doctor appointment paved the way for medical tourism to be demanded (Van Doorslaer et al., 2000). Fifty countries announced that medical tourism is considered one of their national economic development priority in 2012 (Todd, 2011). Based on the length of stay, medical tourists could be segmented into two groups.

Medical tourism had been classified as a type of health tourism by many scholars (e.g.

Smith and Puczko, 2009; Harahshesh, 2002; Cornell, 2006; Thelen and Travers, 2007; Helmy, 1993). Health tourism is classified into medical tourism, medical wellness tourism, and wellness tourism as shown in Table 1.

Table 1: Types of Health Tourism

Medical tourism	Medical wellness tourism	Wellness tourism
<p>It focuses on medicine and healthcare treatment like surgery and pharmacological interventions. It offers a state-of-the-art healthcare through providers like hospitals, clinics and diagnostic centers. Tourism facilitation is required for the following reasons:</p> <ul style="list-style-type: none"> - To facilitate travel arrangements, and coordinate the providing of medical and non-medical services. - To avail recreational, and entertaining activities. 	<p>It focuses on obtaining the balanced between medical services and tourism. The result is a harmony between medical treatments, recuperation programs. Medical wellness programs are provided in spas and resorts under professional medical supervision. (Helmy, 2005). Programs usually address issues like weight loss, stress therapy, body detoxification, thalassotherapy (the use of seawater in cosmetic and health treatment) and aromatherapy (using the natural oils to enhance psychological and physical well-being) (ibid)</p>	<p>It focuses on improving the “feel good” state by rejuvenating the physical and spiritual state of customers using approaches like body pampering (e.g. herbal bath, mud bath), beauty treatments and exercise programs. Those activities could be offered by a department at a resort or a spa in the metropolitan areas.</p>

Source: Helmy, 2005:265

This study is primarily focusing on medical tourism. Medical wellness tourism and wellness tourism are out of the study scope. Although, medical wellness and wellness are important components of health tourism, and the development of both could result in the enhancement of health industry in Egypt. This study is focusing in the relation between

healthcare provision and tourism which is only applicable to the medical tourism concept. This concept could be summarized using the equation shown in Table 2. This equation implies the significance of the three medical tourism pillars that constitutes the medical tourism industry value chain.

Medical tourism value chain encompass visas, air flights with specialized equipment and facilities, customized airline services, transfers, excursions, lodging with special services, shopping, ambulance services (air and land).

Medical Tourism Equation

<p>Medical and healthcare services + Tourism and travel services + Support services = MEDICAL TOURISM</p>
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Source: Helmy, 2005: 296

2.2. Components of Medical Tourism

Medical tourism can be categorized as shown in Figure (1) below:

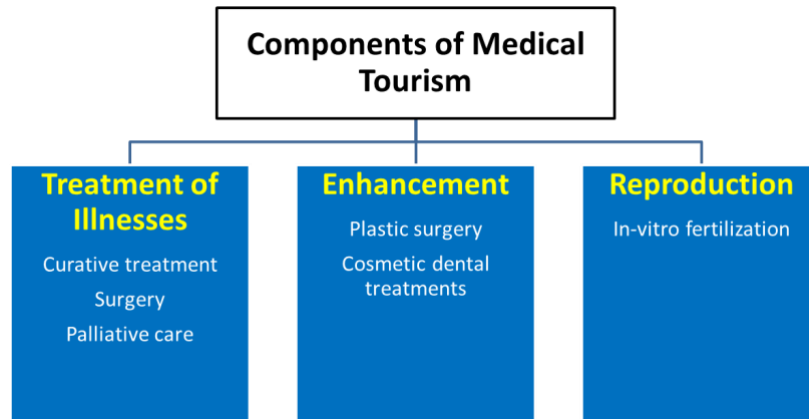


Figure 1: Medical Tourism Components

Source: Smith and Puczko 2008:

‘**Treatment of Illnesses**’ type of medical tourism includes patients who have any functional or psychological condition that necessitates some kind of clinical intervention. Starting from clinical diagnosis, diagnostic test like laboratory tests, and radiological examination, invasive treatments that include surgeries and non-invasive therapies like pharmacological treatments. Those medical services could be provided by clinics, medical centers, tertiary hospitals or complex healthcare systems. Medical specialties are as follows (Lee and Spisto 2007):

- Cardiology
- Dental services
- Dermatology
- Hepatology
- Nephrology
- Oncology (cancer treatment)
- Ophthalmology
- Rheumatology

Medical Treatment could be classified under the following categories:

- 1- **Curative treatment**: using non-invasive treatment approaches (medication and nursing

care).

- 2- **Surgery:** using invasive procedure as open heart surgery and cardiac catheterization.
- 3- **Palliative care:** To alleviate the disease symptoms, and enhance the patient quality of life, but not to treat him/her completely.

‘Enhancement’ type of medical tourism is mainly concerned with enhancing beauty. It includes cosmetic surgery, breast augmentation, dermatologic therapies, liposuction and cosmetic dentistry.

‘Reproduction’ type of medical tourism is a booming type. Patients in this category are seeking to treat medical conditions like infertility and gynecological conditions, or to have in-vivo or in-vitro fertilization. The motivation behind seeking such services abroad could be due to price effect as most of these services are not covered by insurance companies, or in some cases, because it is not legal in the home country to have such therapies (Lee and Spisto 2007).

2.3. Medical Tourism Industry Stakeholders

The following figure shows the categories of medical tourism stakeholders:

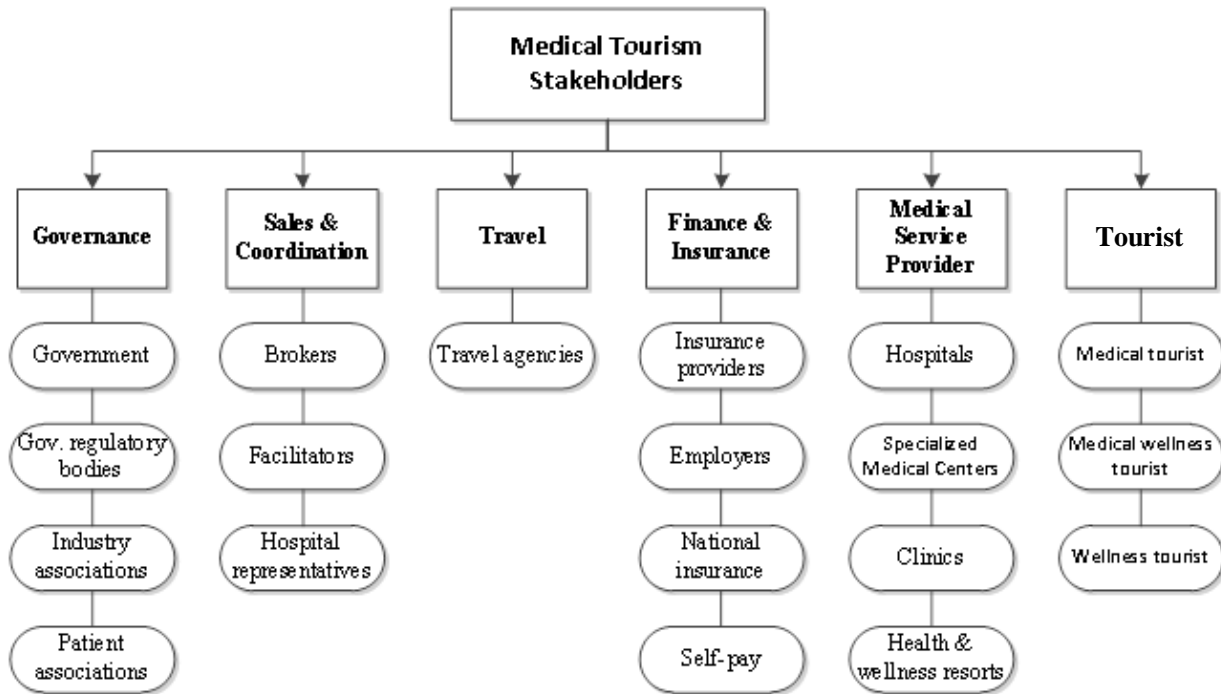


Figure 2: Medical Tourism Stakeholders

Source: Gan & Frederick, 2011

Governance: Government, industry associations and patient representative entities constitutes the main players for forming and establishing an integrated governance of medical tourism in Egypt. Government represented by the Cabinet, the Ministry of Health and Population, the Ministry of Tourism, the Egypt Tourism Authority, and other several governmental bodies have an important role in developing and establishing the necessary governance structure of medical tourism that will enable the industry to develop and flourish.

Sales and Coordination: Brokers, medical tourism facilitators and various hospital representatives are considered as the frontline of the medical tourism industry. Their role is important in availing the proper channels for patients in order to enquire about different

treatment packages and options, different travel destinations, and to facilitate the direct contact with healthcare provider for enquiries related the medical condition and diagnosis.

Travel: Travel is an integral part of the medical tourism experience. It is important to have travel agencies who have the ability to handle this type of tourists in order to effectively accommodate their special needs.

Finance and Insurance: Medical tourists could finance their trip using different methods ranging from self-pay, national healthcare scheme, private-insurance, or employee-insurance. Different payment methods necessities the existence of legal and financial infrastructure in order to accommodate such need.

Medical Service Provider: Which includes hospital, specialized medical centers, clinics, health and wellness resorts. The quality provided by those providers is a crucial determinant for the selection of a provider over another. Quality encompasses everything thing starting from the structure and design of the facility, medical and administrative operations, support services and customer service.

Tourist: The most important stakeholder in the medical tourism industry. Medical tourists have certain consumer characteristics that differentiate him/her from the conventional types of patients seeking medical care. Medical tourist could seek only medical treatment, or wellness or a combination of both. Understanding medical tourist's behavior and preferences is crucial in customizing the proper service package that suit their needs and requirements.

2.4. The Process of Medical Tourism

The following eight stages shown in Figure 3 summarize the process of obtaining medical tourism services starting from the customer enquiry till travelling back to home.

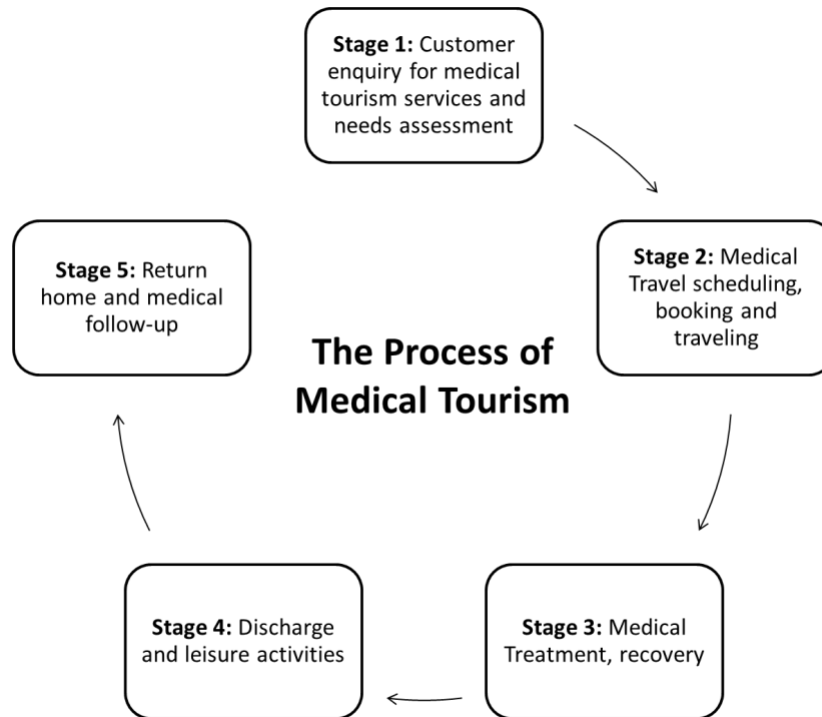


Figure 3: The process of medical tourism

Source: Snyder et al. 2011:

2.4.1 Stage 1: Customer enquiry for medical tourism services and Needs Assessment

In this stage, patient contact medical tourism facilitator (MTF) or the hospital representative to enquire about medical tourism services that suit his/her medical needs. MTF collects patient's demographic data and medical history and send it to a healthcare provider.

MTF send patient demographic data and medical history to a healthcare provider. If the

data provided are not adequate, MTF could arrange a video conference between the patient and the physician. In this stage, the following is usually defined:

- The patient's treatment plan.
- Duration of medical tourism travel.
- Cost of Medical treatment.

2.4.2 Stage 2: Medical Travel scheduling, booking and traveling

Once the treatment plan is defined based on data provided by patient, MTF shall provide the following:

- Travel itinerary.
- A quotation for the full package including travel, medical and other expenses.
- Sign agreements with patient on behalf of healthcare provider.
- Finalize the necessary scheduling and bookings.

MTF role starts at the destination country airport in order to facilitate and coordinate the transportation and accommodation process of the patient, especially for special needs patients. Some MTFs have representative in the home country, which add a competitive advantage.

2.4.3 Stage 3: Medical Treatment, recovery and discharge

This stage starts with patient admission to the healthcare facility. Providing high quality medical service is crucial for customer satisfaction and to ensure positive experience. MTF role in this stage could range from coordination, billing, translation services, and other as deemed

required.

In recovery stage, patient spend a certain amount of time in the healthcare facility depends on his/her medical condition. The main purpose of this stay is to provide the necessary medical and nursing care to restore the patient's physical and mental health.

2.4.4 Stage 4: Discharge and leisure activities

Once the patient is discharged, depending on his/her condition, the patient can enjoy conventional tourism leisure in the destination country. Usually, this type of activity could be a part of the medical tourism package offered by the MTF, or it could be arranged by the patient him/herself.

2.4.5 Stage 5: Return home and medical follow-up

When returning home, patient have to follow certain medical instructions and precautions, depending on the type of operation or treatment that he/she had undergone.

2.5. Medical Tourism Destinations

Malaysia, Thailand, India and Singapore are in the Asian forefront for providing medical tourism services. Those countries are forecasted to control at least 80% of the Asian market share by 2015 (Wong, Velasamy, and Arshad, 2014). In South and Central America, for example, Mexico, Brazil, Costa Rica and Cuba are the major destinations (Lunt and Carrera, 2010). In the Middle East, Turkey, UAE and Jordan are investing in promoting their position as international medical tourism hubs. In Europe, Scandinavia, Southern and Central Europe countries are

historically known for medical and especially wellness tourism. According to Connel (2006), Europeans are opted to seek healthcare services in India, Malaysia, and Thailand.

2.5.1 Thailand

Medical tourists are travelling to Thailand since the 1970s (Hall, 2013). According to Thai governmental reports, Thailand provided medical services for about 2.53 million foreign patients that generated an income of approximately USD 4 to 4.6 billion in 2012. Almost 35% of medical tourists travelling to Thailand are from Japan, USA, UK, Middle East, and Australia (MyMedHoliday, 2017). Thailand facilitated the access to its medical facilities by granting visa on arrival to most foreign nationalities, which grants them 90 days of stay.

Many Thai hospitals are internationally accredited. As of June 2016, there are 54 Joint Commission International accredited hospitals in Thailand, most of them are in capital Bangkok (“Find a Gold Seal Hospital | WorldHospitalSearch.org,” 2017). Thai hospitals employ many foreign medical staff in order to overcome the language barrier. Most of doctors are trained and educated in Western countries, including USA and the UK (Chantal and Siripen, 2013). Thai hospitals such as Bumrungrad International Hospital, Bangkok Hospital, Samitivej Hospital are well-known for excellence in healthcare. Thai government represented by the Tourism Authority of Thailand (TAT) is heavily marketing Thai healthcare services using familiarization tours organized for international media and potential buyers. However, the recent political instability dampened much of its promotional effort (Rerkrujipimol, & Assenov, 2011).

2.5.2. Malaysia

Malaysia has gradually becoming a destination of choice for its high end medical facilities, and western trained healthcare providers (Shah, 2008). According to Malaysian 2020 vision, medical tourism is planned to add approximately USD 3.2 billion to their GDP, 1.9 million medical tourists (MoH, n.d.). The Malaysia Healthcare Travel Council (MHTC) was created in 2009 in order to achieve such target. Malaysia attracts patients from the Middle East and North Africa (MENA) and Indonesia for being a Muslim majority country who understand cultural sensitivities of such countries (Leong, 2014).

The Malaysian government adopted the Public-Private Partnership (PPP) to form win-win partnerships with private sector for enhancing medical tourism profile in Malaysia (Pocock et al., 2011). On the other hand, the government facilitates foreign patient's entry to the country by granting 90 days instead of 30 days for medical tourism visa. The visa also gives access to four relatives to accompany the patient during his stay in Malaysia (Chee, 2007). Malaysia is famous cardiothoracic surgery, oncology treatments, cosmetic surgery and fertility treatment. Traditional and complementary medicine is also available In addition; Malaysia also offers traditional and complementary medicine (Hall 2013). Healthcare accreditation is adopted by several private healthcare facilities, many hospital are accredited by Joint Commission, an American accreditation scheme that is internationally recognized.

2.5.3. Singapore

Singaporean government is heavily investing in marketing and branding itself as the ultimate destination for medical tourism. Most of Singapore's medical tourists are from Japan,

and it is estimated that 800,000 medical tourists entered Singapore in 2013 (Connell, 2006). Despite being a city-state, with a small population, Singapore government set a goal to welcome at least 1 million medical tourists every year. Singapore Tourism Board had declared that 850,000 patients had visited Singapore in 2012. This number had been argued by IMTJ for being inclusive of relatives travelling with the patient, and local expatriates (IMTG, 2013).

2.5.4. India

Globally, India is considered one of the most cost efficient medical tourism destinations. India offers comprehensive medical services such as Ayurvedic medicine which is an ancient holistic therapy system along with the Western medicine, yoga and meditation (Hall, 2013). The Indian government is giving numerous incentives for hospital groups like Apollo Hospitals and Fortis Healthcare in order to create overseas branches. This will enhance India's brand and contribute to create a competitive edge. In 2012, 171,021 medical tourists visited India according to the Indian Ministry of Tourism, which is greater than the previous year by 23%. Majority of foreign tourists are from Africa, South Asia, and Middle East (Government of India, Ministry of Tourism, Market Research Division, 2012). One of the challenges that face medical tourism industry in India is its inadequate infrastructure system and general hygiene conditions that is far from other competing medical tourism destinations (Gan and Song, 2012). Also, pricing of different medical services is less uniform across different hospitals which opens the gate for fraud affects the image of medical tourism in India and make many foreign patients reluctant to choose India.

2.5.5. Turkey

Prior to 1990, the dominant public healthcare facilities were the dominant provider of medical services in Turkey. Since then, the government decided to incentivize investment in private sector which resulted in a booming healthcare industry (Erdoğan, Yılmaz, and İşletmecilği 2012). In parallel to the development of healthcare infrastructure, also investment in health care workforce by attracting western educated health practitioners and getting the international accreditation like the Joint Commission's Accreditation for many Turkish hospitals. All this developments had resulted in an average of 40,000 foreign patient flocking to Turkey every year (Erdoğan, Yılmaz, and İşletmecil, 2012).

2.5.6. United Arab Emirates (UAE)

Dubai is considered one of the emerging markets for medical tourism in the Middle East. Dubai government is heavily investing in healthcare infrastructure, attracting and affiliating with international health groups and institutions and employing western educated and trained healthcare providers. Investment given the emirate's relatively limited oil reserves, and a prestige sector and its aim of becoming a global site for high level services (Saber, 2014).

Dubai is targeting to attract 500,000 medical tourists by 2020. According to Dubai Health Authority, the number of medical tourists in Dubai had reached 300,000 in 2015, and is projected to increase by 13% a year. Many of those tourists are coming expats in other Gulf Cooperation Countries, citizens of countries suffering from civil wars like Syria and Libya, and wealthy tourists coming from the Indian subcontinent (Saber, 2014).

2.5.7. Jordan

Medical tourism sector in Jordan had doubled in a decade from 99,000 in 1999 to 220,000 in 2009. The sector is rapidly growing. The industry contributed over US\$1.2 billion in 2014 to the national economy (PHA, 2010).

Although Jordan is a preferred regional destination for patients from Arab countries like Syria, Saudi Arabia, Libya, and Yemen (PHA 2010), it still faces challenges related to the shortage healthcare manpower especially nursing, lack of advance healthcare management programs and human resources, poor integration among different healthcare providers (National Agenda, 2015).

2.5.8. Egypt

International tourism plays a vital role in supporting Egypt's economy. According to the World Bank, international tourist arrivals reached its peak in 2010 by 14 million (see Figure 4) (World Bank, 2017). This is mainly attributed the adoption and implementation The Ministry of Tourism's National Sustainability Tourism Strategy 2020, prepared through a transparent and participatory planning process, is aligned with Egypt's National Strategy for Sustainable Development and is in coherence with the objectives of the UNWTO Millennium Development Goals of poverty alleviation, economic growth, community development and environmental conservation. The outcomes of the 3-phase study on which the strategy was based, are the development of a five-year action plan identifying a road map for the industry's future as well as

mechanisms for the implementation of defined objectives. The Strategy proposed upgrading the infrastructure, enhancing human resource skills and the quality of services. It also provided recommendations on the environmental, social and economic measures that have to be implemented in the short- and medium-term as well as proposing new tools for monitoring and evaluating targets and performance indicators (OECD 2010). Tourism positively contributes to the overall growth of the Egyptian economy by enhancing employment, maximizing government revenues and foreign exchange earnings and modernizing of infrastructure. Medical tourism as a subsector of the tourism industry can benefit from the current systems and infrastructure.

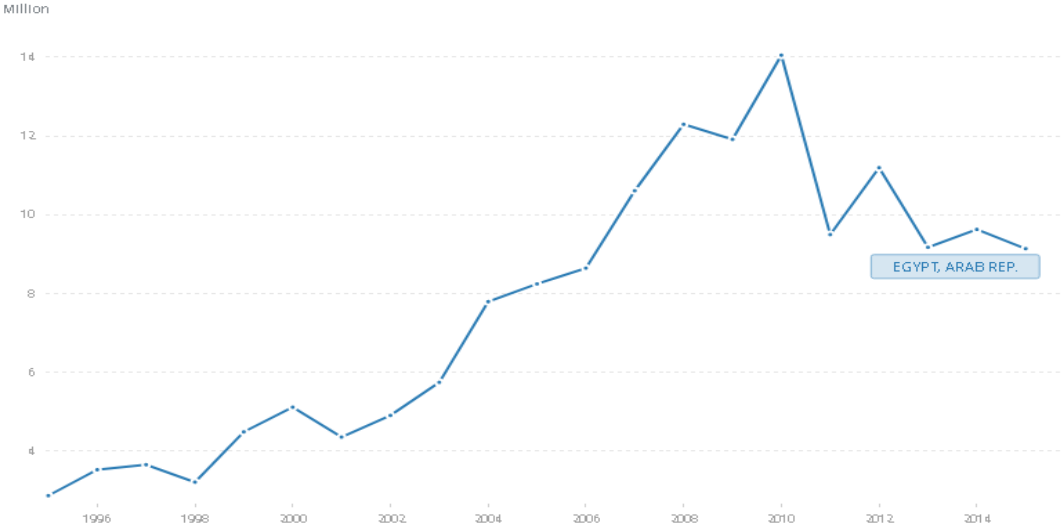


Figure 4: International Tourism, Number of Arrivals in Egypt (1996-2014)

Source: World Bank, 2017.

<http://data.worldbank.org/indicator/ST.INT.ARVL>

According to the Ministry of Health, total hospitals in Egypt were 2066 in 2015 with 126,804 beds, 660 public hospitals with total 93,267 beds, and 1406 private hospitals with

33,537 beds (Figure 5) (NICHP, 2015). It is a fact that the sector is suffering from a dilapidated infrastructure that requires complete renovation. This is why the Egyptian government is heavily promoting private investments in healthcare sector. The government represented by the Ministry of Health is planning to build and renovate a total of 171 hospitals by 2020 in order to accommodate the local demand (Al Ahram, January 04, 2017).

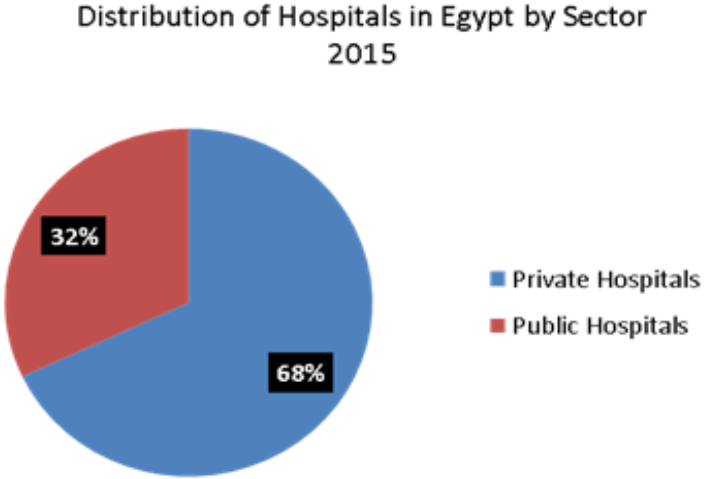


Figure 5: Distribution of hospitals in Egypt by sector

Source: NICHP, 2015:1.

The Egyptian healthcare sector is attracting considerable amount of foreign investments (Egyptindependent, April 20, 2016). Some large private holding companies like the UAE based Abraaj Capital and the Saudi Andalusia Group and Saudi German Hospital Group have already expanded in the Egyptian market. Despite the considerable investment in healthcare, few hospitals are accredited. The Ministry of Health has a national scheme for accreditation, which is

not the priority of the current agenda of the ministry. Limited number of private and military hospitals which are JCI accredited (six hospitals: As-Salam International Hospital, Children Cancer Hospital Egypt (CCHE) 57357, Dar Al Fouad Hospital, ElAraby Hospital, International Medical Center, Magrabi Eye Hospital.) (JCI, 2017).

Currently, Egypt attracts around 50,000 medical tourists, mostly from Libya (Helmy and Travers, 2009). Type of treatments, destinations and length of stay of those patients are not known, this is why it is essential to put in place a comprehensive database to track those patients which will give an in-depth understanding of the market dynamics (Helmy and Travers, 2009).

One of the promising initiatives to attract medical tourists to Egypt is a project called “Tour n’ Cure”. The goal of the initiative is to provide Hepatitis C patients the chance to receive Virus C medications at affordable prices. The initiative is organized by MoHP Health, Tourism Ministry, and Aviation Ministry. Tour n’ Cure treatment package comprises of medical and excursion components. The government is very enthusiastic about this initiative and aspires to attract medical tourists to Egypt.

2.6. The Travel & Tourism Competitiveness Report 2017

The following is the rankings of the Travel & Tourism Competitiveness Report 2017

Table 2: the Travel & Tourism Competitiveness Report 2017

	Singapore	Malaysia	UAE	Thailand	India	Turkey	Egypt	Jordan
Travel & Tourism Competitiveness Index1-7 (best)	13	26	29	34	40	44	74	75
Business environment	2	17	5	45	89	63	78	41
Safety and security	6	41	2	118	114	116	130	38
Health and hygiene	62	77	63	90	104	64	68	61
Human resources and labor market	5	22	23	40	87	94	102	74
ICT readiness	14	39	15	58	112	72	89	44
Price competitiveness	91	3	56	18	10	70	2	81
Infrastructure	2	32	10	33	58	38	82	71

Source: World Economic Forum

CHAPTER THREE: CONCEPTUAL FRAMEWORK

3.1. Integrated Model of Medical Tourism

Heung et al. (2010) proposed a theoretical framework for the study of medical tourism that includes both the supply and demand aspects. Heung study had extensively reviewed medical tourism literature and it revealed that no integrated theoretical framework exists. Based on their critical examination of three different models, they proposed an integrated model that addresses every aspect of medical tourism (Heung et al., 2010). Several factors affect the decision of an international patient for which destination to select in order to receive his/her medical treatment. Those factors are shown in (Figure 7) and are discussed below:

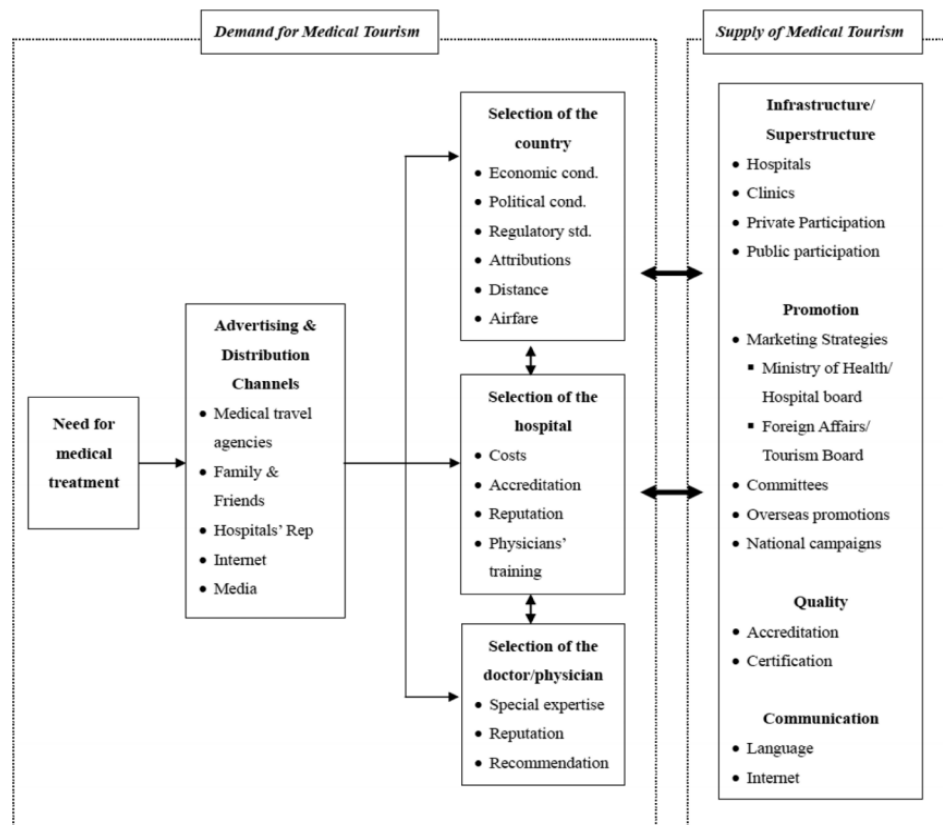


Figure 7: Integrated Model of Medical Tourism.

Source: Heung, Kucukusta, and Song, 2010: 244.

3.2. Marketing, Advertising and Distribution Channels

Promotion and the availability of medical tourism intermediaries affect both the supply and demand sides. Medical tourism intermediaries facilitate the expansion and growth of medical tourism by actively engage in advertising, linking between medical tourists and healthcare providers, assisting in the selection, and coordinating the whole process (Crooks et al., 2011).

3.2.1 Medical Travel Agencies

Medical travel agencies (MTAs) are essential in managing every aspect of the patient's medical treatment experience, from the first contact, through full recuperation. They are responsible for the coordination of the process, and to take care of the details such as transportation arrangements, accommodation, medical consultations appointments, surgery and operations appointments, Collect, manage and convey confidential patient's medical information to the foreign healthcare provider. One of the important functions of MTAs is to conduct site inspections of the healthcare provider facility in order to accurately comprehend and understand the true conditions of each destination, they should possess a strong relationship with the healthcare service provider facility that enable them to directly communicate with the management if necessary in order to resolve any issues that require intervention and resolution. MTAs are responsible also for guiding the patient through the assessment, quotation, scheduling, and planning processes and is responsible for fully represent and negotiate on the behalf of the patient in order to ensure the most current, accurate information as well as the best pricing for all

aspects of the patient's medical retreat (Crawford, 2006).

3.2.2. Family and Friends

Getting firsthand information about certain medical tourism destination from a trusted family member or a close friend had been proved to be an important determinant for selecting certain medical tourism destination. Word-of-mouth (WOM) from family and relatives is one of the important factors when selecting a certain medical tourism destination and facility. For example, Emirati patients had been surveyed about which drivers that greatly influences their decision for selecting particular destination. They were given the options of government support, word-of-mouth, web, medical technology, tourism, low cost, and facilities. WOM had been nominated to be the main determinant for patients to visit Korea (Choi et al., 2016).

WOM in healthcare is a very influencing concept that affects opinions, behaviors, and emotions which eventually affect the purchasing decision of patients. WOM is a social act that originates from a psychological need of the patients to assume the actions and decisions of trusted family and friends when selecting a specific healthcare provider. WOM is prominent in when information about healthcare provider is scarce and when patients are not able to determine the right decision.

3.2.3. Internet and Social Media

Internet and social media play a crucial role in the promotion and marketing for a certain medical tourism destination. It becomes a key tool for promoting certain medical tourism

destination and a platform for providing access to health care information, on the one hand, and advertising, on the other hand (Horsfall et al., 2013).

Internet enable patients to get access for healthcare information and advertising from anywhere in the world. It offers healthcare providers essential new channels for marketing and reach into international markets. Lunt et al. (2010) grouped the following types of websites:

- Portals (main focus on provider and medical information).
- Media websites which is consumer-driven.
- Commerce sites (for ancillary services and related information).
- Professional contributions (sponsored by governmental, regulatory and professional associations).

Medical tourism sites and social media accounts provide a range of ends and needs. First and foremost, the scope of such sites is to introduce and promote services to the consumer. The main services of the sites can be separated into four main functions (Lunt et al. 2011):

- Gateway to medical and surgical information.
- Connectivity to related health services.
- The assessment and/or promotion of services.
- Commerciality and opportunity for communication.

3.3. Political and Economic Conditions

Economic and political stability play an integral role in the decision making and selection

of a certain medical tourism destination. Price transparency, security of financial transactions, availability of various payment options, stability of currency exchange rates, and security all contributes to selecting a particular destination over others.

Political and economic instability are strongly related to uncertainty. Uncertainties are an essential product of unexpected events that severely affect the tourism industry demand. War, terrorism, natural disasters, and financial crises all are examples of unexpected events that contribute to sharply decreasing tourism demand in general, and medical tourism in particular (Tekin, 2015).

3.4. Regulatory Standards

Regulatory factors also affect the patient's decision making. The availability of legal framework that protects the patient and provider in case of any financial or medical dispute gives confidence to international community. Also, the unavailability of certain procedures in home country due to domestic regulations, creates a market for medical tourism destinations who legalize such procedures like stem cell therapy and organ transplantation (Watson and Stolley, 2012).

Regulation of medical tourism agencies is necessary to gain the confidence of the international tourist. Regulation shall outline the legal and ethical framework for conducting such a business as the following aspects (Watson and Stolley, 2012):

- Ensure the credibility of the medical tourism agents.

- Improve price transparency.
- Secure the commitment to provide after discharge care.
- Ensure patient safety and him/her against malpractice and possible adverse events.
- Ensure the confidentiality of patient's medical records.
- Obtain patient's informed consent. Patient has to be informed of the benefits, risks, and alternative treatments in order to make an informed decision about the care or treatment provided.
- Legal issues related to travel, stay visa, and flying against medical advice in case needed.
- There is a mechanism for dispute resolution in case of things goes wrong.

3.5. Cultural Attributions

Cultural ties play an important role in the selection of a certain medical tourism destination. Geographical proximity is not a determinant in that case, rather cultural proximity is more important. Distant destinations with closer cultural ties could be more appealing to international patients of certain region. The cultural component could be summarized in the following factors (Connell, 2013):

Language: Communication is vital to a good patient experience. It is essential that the healthcare provider and patients have a common form of communication. Interpreters could provide a solution for the problem of language barrier, but it is not the ideal solution. The ability of medical staff to communicate directly with the patient, gives a totally different patient experience.

Religion: For certain groups of patients, religious beliefs are an essential component of their culture. Healthcare providers who understand this component and have the ability to provide their services without violating or offending such beliefs could have a competitive advantage over others.

Food: Although it could be not that much a detrimental factor for choosing a country over another, but still a factor that indirectly affects the patient's choice. Arab patients who seek treatment in UK tend to bring their extended family with. They choose to stay in a private apartment, not in a hotel in order to be able to cook their own local dishes.

3.6. Distance and Travel

Geographical proximity: or distance between the patient's home and their healthcare provider destination has an effect on transportation charges and convenience (Connell, 2006). In other words, how easy is it for medical tourists to get to a certain hospital or clinic? This is why most of medical tourism is regional not international.

Travel convenience: an important aspect of medical travel is the convenience or ease of accessing the destination country. Visa barriers like complicated and lengthy procedures could discourage many patients from selecting such destinations. On the other hand, countries that have a fast track system for obtaining medical care visa had created an important competitive advantage that added to their attraction portfolio.

3.7. Costs of Medical Care

Cost of medical treatment is a primary motivator for medical tourists when selecting a destination. Medical services cost are very high in developed countries for services that are not covered by national health insurance like cosmetic and bariatric surgery, dentistry, and reproductive medical services like In Vitro Fertilization (IVF). The huge difference in prices acts as a strong incentive for patients and also for third party payers like insurance companies.

3.8. Healthcare Quality and Accreditation

One of the most crucial factors is the service quality provided by the destination country in medical tourism industry. Medical tourists focus greatly on this issue. Thus the destination country must fulfill the expectations of the medical tourists through quality service and performance. In the service providing organizations, service quality is proven as an important determinant of competitiveness.

Service quality dimensions could be summarized as follows:

- Reliability
- Tangibles
- Empathy
- Responsiveness
- Assurance

3.9. Healthcare Accreditation

The lack of well-defined clinical governance framework, had contributed in the emergence of concerns related to quality and safety of the medical care provided. In order to bridge this gap, international accreditation organization like the JCI and the International Society for Quality in Healthcare (ISQua) have developed healthcare quality management framework in order to act as a basis for clinical governance in the healthcare provider.

3.10. Physician Expertise and Reputation

One of the most important factors in selecting a medical tourism destination is the reputation of the treating physician. Western educated and well-trained physicians give confidence to the patients, especially when this physician is able to fluently communicate with the patient in order to answer his/her enquiries and concerns.

3.11. Healthcare Facilities Infrastructure

Healthcare infrastructure has many components: physical facilities that make care accessible; laboratory, training, and other support facilities; reliable supplies of pharmaceuticals and other materials; trained staff and professional training systems; and mechanisms to distribute resources and expertise to people who need them. An adequate system is capable of providing preventive, diagnostic, and curative care, according to the requirements of the people being served.

This integrated model as shown in Figure 7 consists of two components, the demand side

and supply side. Each factor in the demand and supply side had been described to show how it affects the patients' final decision. The integration and interaction of both sides affect the medical tourist decision-making process and selection of his/her destination. The demand side of the integrated model is mainly dictated by the patient specific needs and personal preferences. The supply side consists of all of the facilities, efforts, and services offered by the host destination. Aspects like medical facilities, the quality medical care and cultural issues are important factors that attract medical tourists. The demand and supply sides of the integrated model interact with each another in a direct and indirect way to influence the final choice of a medical tourist.

3.11 A brief description of SWOT analysis:

SWOT analysis is a well-known strategic analysis tool for identifying the internal and external environment of an organization, system or industry (Humphrey, 2005). It examines the strengths and weaknesses points of the system (Humphrey, 2005). This study also takes into consideration the studying of the external that out of the entities control (opportunities and threats).

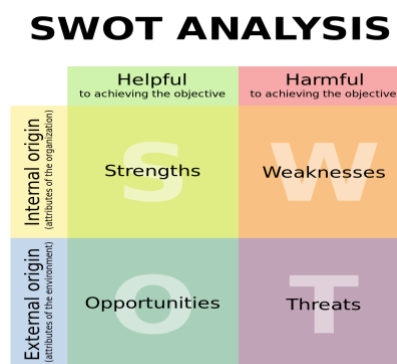


Figure 9: SWOT analysis
Source: Humphrey, 2005: page 7

CHAPTER FOUR: RESEARCH METHODOLOGY

This study uses different qualitative research methodologies with illustrative statistics and numbers as from secondary sources that aim to illustrate the findings in a logical way. The researcher conducted in-depth qualitative interviews with different stakeholders in the medical tourism industry. The interviews had been conducted using a questionnaire that encompasses all the supply and demand sides of the integrated model of medical tourism.

Interviewees had been selected based on criteria detailed in the next section. They represent the public and private stakeholders of the medical tourism industry in Egypt. The main purpose of the interview was to examine the strengths, weaknesses, threats and opportunities of the medical tourism industry based on the supply and demand criteria mentioned in the integrated model of medical tourism. Findings from these interviews shall be analyzed using the SWOT analysis technique and to be discussed in details in order to formulate effective policy recommendations.

The process could be illustrated as follows:

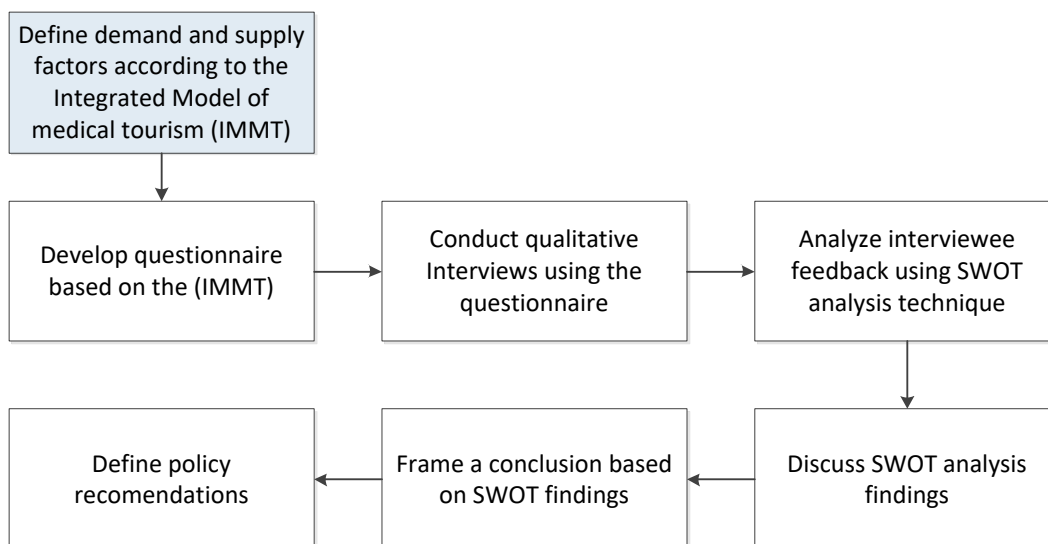


Figure 8: Questionnaire development and Analysis

4.1. Limitations of the study

Limited literature related to medical tourism in Egypt was a limitation to this research. Unavailability to systematic studies about the characteristics and trends of medical tourism created a challenge to the researcher. However, interviews conducted with different stakeholders had given a relatively in-depth insight about the sector characteristics and dynamics.

4.2. Data Collection

Primary data were collected using qualitative interviews. Qualitative interviews aim at understanding participants by setting a mental framework of study questions instead of the more rigid semi-structured interview questionnaires (Yin, 2011). The qualitative interview method enhances the conversational mode, and active listening in a two-way interactions (Rubin and Rubin, 2011). The interview questions were open rather than closed-ended in order to give the interviewees the opportunity to use their own words instead of those predefined by the researcher.

Primary data sources were the face-to-face interviews with different stakeholders. A total of 10 interviewees were conducted and the sample were purposively selected in order to satisfy the below mentioned criteria. The goal of choosing this sampling technique because it yielded the most relevant and plentiful data, given the topic of this study (Yin, 2011). Interviewee sampling was based on the following criteria:

1. Has a familiarity and experience with medical tourism industry.
2. Is actively working on a policy, law, or initiative related to medical tourism?
3. Provides healthcare services, treatments to international patients.
4. Facilitate and coordinate medical tourism trips.
5. Advertising, promoting and campaigning medical tourism.
6. Has experience in healthcare quality and accreditation.

Interviewees were chosen from the following entities and organizations that represent the main players of medical tourism industry in Egypt:

1. Ministry of Health and Population (MoHP)
2. MoHP Accreditation Executive committee: The director of the committee.
3. Ministry of Tourism (MoT).
4. The Egyptian Tourism Authority (ETA).
5. The Parliamentary Tourism and Civil Aviation Committee (TCAC).
6. An International Healthcare Accreditation expert.
7. A Public Hospital
8. A Private Hospital
9. A Medical tourism agency.
10. A Travel Agency.
11. Healthcare IT expert.

Secondary data sources include the following:

1. National reports and statistics (i.e. from CAPMAS).
2. International Organizations publications (i.e. WHO and World Bank).

3. Various academic journals (i.e. International Medical Travel Journal).

4.3. Data Analysis

SWOT is a qualitative analysis method used for the assessment of the strategic position of a certain organization, sector, market or an entire industry. The acronym “SWOT” represents the words: Strengths, Weaknesses, Opportunities and Threats (see Figure 8). In this study, the competitive advantage of medical tourism in Egypt shall be analyzed using Heung et al. (2010) integrated model and SWOT shall be utilized for the characterization of the current state of the medical tourism industry in Egypt in order to define the internal environment (strengths and weaknesses) and external environment (weaknesses and opportunities) as an important part of the strategic planning process.

4.3. Research Design

Research design is important for integrating the different components of the study in a coherent and logical way, thereby, ensuring you will effectively address the research problem; it constitutes the blueprint for the collection, measurement, and analysis of data.

Table 3: Research Design

Research Question	Criteria for Data definition	Data collection method/tool	Source of Data	Data Analysis method
What is the current status of medical tourism in Egypt?	-No of total tourists in Egypt. -No of medical tourists. -Status of healthcare infrastructure. -Status of	Online & offline databases research of secondary data publicly available (e.g. studies, reports and statistics)	National reports and statistics (i.e. from CAPMAS). International Organizations publications (i.e. WHO and World Bank). Various academic	Descriptive

Research Question	Criteria for Data definition	Data collection method/tool	Source of Data	Data Analysis method
	healthcare quality of service.		journals (i.e. International Medical Travel Journal).	
What are the strengths, weaknesses, opportunities and threats of medical tourism industry in Egypt?	Integrated Model for Medical Tourism	Interview of medical tourism stakeholders using the Interview questionnaire	- Medical Tourism Stakeholders (primary source) - Literature (secondary source)	SWOT analysis
What are the required policies, entities and strategic plans needed to realize the goal of having a strong and competitive medical tourism industry?	Weaknesses of medical tourism in Egypt	Review, categorize & tabulate the findings.	SWOT findings.	Review of findings

CHAPTER FIVE: SWOT ANALYSIS OF MEDICAL TOURISM IN EGYPT

In this chapter, the study presents and discusses the data collected from semi-structured interviews conducted with different stakeholders of the medical tourism industry along with secondary resources. SWOT analysis had been used as an analysis tool in order to reach the findings of this study. Findings are summarized and presented in Tables 4 and 5 in four categories (strengths, weaknesses, opportunities and threats):

Table 4: SWOT Analysis of Medical Tourism in Egypt

Conceptual Framework Factor	Corresponding Question	SWOT	Policy Recommendation
Marketing, Advertising and Distribution Channels	How do you evaluate current marketing, advertising and promotion activities done by governmental or private sector?	Poor marketing and branding campaigns. Egypt's brand is greatly depending on conventional tourism in general with limited awareness of its medical tourism capabilities.	Develop & integrate a global & regional marketing strategy Establish cooperative marketing agreements
Medical Travel Agencies	How do you evaluate current marketing, advertising and promotion activities done by governmental or private sector?	Lack of specialized travel agencies and tour operators working in the medical tourism sector is negatively affect the ability of the Egyptian market to spot and attract potential medical tourists. Such agents are required to coordinate and provide support services and to act as intermediaries between healthcare providers and medical tourists, and also to participate in marketing the destination.	Develop & integrate a global & regional marketing strategy Establish cooperative marketing agreements
Family and Friends	How do you evaluate current marketing, advertising and promotion activities done by governmental or private	The concept of social marketing is not well utilized in Egypt for developing activities that aim at affecting	Promote medical tourism conferences in Egypt

Conceptual Framework Factor	Corresponding Question	SWOT	Policy Recommendation
	sector?	patient's decision making for choosing Egypt as the destination of choice.	
Internet and Social Media	How do you evaluate Egypt's telecommunications infrastructure and its role in facilitating the growth of medical tourism?	Very few medical tourism websites are in place. No organized online campaigns using social media	Develop & integrate a global & regional marketing strategy
Regulatory Standards	How do you evaluate laws and regulations related to medical tourism in Egypt? Do you think they provide the necessary legal framework for operating such an industry?	No legal framework to regulate the provision of healthcare services to medical tourists.	Create inter-ministerial committee Establish a medical tourism industry representation association Establish a medical tourist services office Regulate healthcare accreditation
Cultural Attributions	How do you evaluate the cultural and social aspects related to medical tourism in Egypt? Do you think we need to become a more tourist-friendly destination?.	Another critical point is related to the low healthcare staff (doctors and nursing) performance with related to customer care and personal communication skills. Healthcare staff quality is a critical success factor and one of the main attractors of medical tourists	Enhancing the capacity of healthcare and tourism workforce
Distance and Travel	How do you evaluate Egypt's transportation facilities, and its capacity to accommodate the needs of medical tourism industry?	No weaknesses	
Costs of Medical Care	Do you think healthcare costs in Egypt are competitive compared to other medical tourism destinations?	No weaknesses	
Healthcare Quality and Accreditation	How do you evaluate the role of healthcare accreditation in adding value, and attracting medical tourists?	Although Egypt has its national accreditation system, but most of Egyptian hospitals are yet to be	Regulate healthcare accreditation Form strategic alliances with

Conceptual Framework Factor	Corresponding Question	SWOT	Policy Recommendation
		accredited. Having and enforcing national or international accreditation systems is essential to provide the minimum healthcare quality assurance. Quality assurance systems should also be extended to support service suppliers and ambulatory clinics.	international healthcare providers
Physician Expertise and Reputation	How do you evaluate Egypt's healthcare manpower capacity to handle international patients?	No formal education for healthcare providers to enhance their skills and ability to handle medical tourists.	Enhancing the capacity of healthcare and tourism workforce
Healthcare Facilities Infrastructure	Is the current healthcare infrastructure in Egypt (public and private) is sufficient for serving medical tourism industry in Egypt? Kindly, provide your evaluation and recommendations.	The current facilities serving the sector are not adequate. The current system requires a big infrastructure investment in order enhance responsiveness and ability to handle critical cases effectively and efficiently.	Promote direct investments in medical tourism Modernize healthcare provider facilities Develop support services
Political and Economic Conditions	How do you evaluate the current political situation as determinant factor for attracting tourists in general, and medical tourists in specific? How do you evaluate the current and projected economic situation in relation to medical tourism?	The political and security situation is not stable due to terrorism especially at the borders. The economic situation is improving. Egypt has embarked on a major economic reform program, including the liberalization of the exchange rate regime, fiscal consolidation measures and reforms to the business environment.	Develop & integrate a global & regional marketing strategy

Table 5: SWOT Analysis of Medical Tourism in Egypt (categorized)

Strengths	Weaknesses
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Strengths	Weaknesses
<p>Tourism and hospitality:</p> <ul style="list-style-type: none"> ● Existing and well positioned Egyptian tourist product. ● Variety and abundance in accommodation capacity. ● Diverse cultural and ecological and cultural resources. ● Stable weather especially from October to May. ● Recent investments in tourism in the Mediterranean sea north coast. ● A well-established tourism manpower. ● Well-developed tour operation services ● Presence of governmental and private tourism organizations. <p>Healthcare:</p> <ul style="list-style-type: none"> ● Healthcare system is rooted with tradition of medicine. 	<p>Policy/strategy:</p> <ul style="list-style-type: none"> ● No comprehensive national strategy for the development and promotion of medical tourism. ● No established governance of medical tourism. ● Role of governmental and non-governmental entities is not clear in the process of medical tourism development. ● No industry association for medical tourism. ● Bureaucracy negatively affects the attraction of direct investments to the sector. <p>Tourism and hospitality:</p> <ul style="list-style-type: none"> ● Many facilities are not well equipped for patients with disabilities. ● Limited number of specialized medical travel facilitators.

Strengths	Weaknesses
<ul style="list-style-type: none"> ● Big pool of skilled and professional physicians ● Increasing number of private hospitals/clinics. ● Increasing number of accredited healthcare, but still a few. <p>Infrastructure and support services:</p> <ul style="list-style-type: none"> ● Availability of airports at major tourist destinations. 	<ul style="list-style-type: none"> ● Poor marketing in tourism campaigns. ● Egypt Air's role in promoting the sector is not clear or well defined. ● Weak branding of Egypt's image as a medical tourism destination. <p>Healthcare:</p> <ul style="list-style-type: none"> ● The hospital management concept is not mature enough to develop and manage this kind of customers. ● Nursing performance and communication skills are below average. ● Weak cooperation between healthcare providers and international medical institutions for providing training to physicians'. ● The Egyptian National Accreditation system is not mandatory. ● Few accredited healthcare providers.

Strengths	Weaknesses
	<ul style="list-style-type: none"> ● Weak direct marketing with medical tourists. ● Inadequate ambulance facilities. ● No national quality assurance framework for medical tourism products.

Opportunities	Threats
<p>External:</p> <ul style="list-style-type: none"> ● Number of medical tourists is steadily growing. ● Globalization and telecommunication had the door for endless opportunities. ● Devaluation of the Egyptian pound, 	<ul style="list-style-type: none"> ● Fierce competition from regional and international players. ● Political instability and terrorism in the Middle East region.

<p>which positively affects the FDI inflow to Egypt.</p> <p>Internal:</p> <ul style="list-style-type: none"> ● Relatively lower labor cost. ● Integration of state of the art medical equipment into the medical tourism services. 	
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Source: Author.

5.1. Strengths of Medical Tourism Sector in Egypt

In a SWOT analysis, strengths usually belong to the internal environment of the system (Bryson, 2011). Therefore, in this section, the researcher focused on some intrinsic system issues to be able to determine the strength points. For instance, the researcher investigated what the returns of the system are and what the system's good implications or positive applications are (ibid).

5.1.1 Tourism and hospitality:

Egypt has well-positioned tourist destinations offering a potential for developing medical tourism as an integrated part of the existing Egyptian tourist product with a wide range of means

of tourist accommodation and lodging capacity at major tourist destinations. Egypt's tourism industry has a good base of tourist personnel, existing operation system/services, existing formal and informal tourism organizations. Adding to that, the variety of ecological and cultural resources adds to the competitiveness of its medical tourism packages and programs. Recently, Egypt witnessed a significant increase in tourism investments (Marassi and Porto Ghalib are two good examples).

5.1.2 Healthcare:

Egypt has a rooted healthcare system and tradition of medicine with a good base of skilled and professional physicians. Although the current workforce are not well-trained to handle international patients, but this could be changed by with extensive capacity building programs for different healthcare providers.

Another strength of the Egyptian healthcare industry is the growing number of private sector healthcare providers seeking to invest in Egypt. Private groups like Abraaj, Andalusia and the Middle East Healthcare Company (MEAHCO) had invested billions of pounds in investments in the Egyptian healthcare sector (Multiples Group, 2015).

The emergence of healthcare providers with international accreditation and affiliation, albeit still a few but considered as a good incentive for other healthcare providers to follow. Gaining the international accreditation shall enhance the good-well of the Egyptian healthcare sector on a regional and international basis (JCI 2017).

5.1.3 Infrastructure and support services:

The existence of international airports at major tourist destinations serves as a good attraction for medical tourists. Currently, the government is planning for enhancing the current infrastructure and to build new airports to increase the handling capacity.

5.2. Weaknesses of Medical Tourism Sector in Egypt

5.2.1 Policy/Strategy:

The absence of a clear development strategy for the medical tourism sector with a clear vision, strategic objectives and established timeframes is a crucial weakness of the medical tourism industry in Egypt. This finding necessitates that the Egyptian government to start developing a vision and a strategic objectives for the sector.

The absence of a clear development strategy had resulted in the lack of collaboration and communication between MoHP and MoT. Effective cooperation among relevant stakeholders is crucial for realizing the development goals for the medical tourism sector. Currently, no legal entity (e.g. Medical Tourism Association) is actively representing the industry. Countries such as Singapore, India and UAE have formed medical tourism associations that serves as a focal point for the sector planning for development (Bookman 2007). Also, Egyptian bureaucracy is well-known for hindering the establishment of potential projects. It is crucially required to combat bureaucracy which is widely recognized as a significant business killer in Egypt.

Difficulties for Spa & Wellness providers to important sufficient high quality products for the treatments in time due to long delays and bureaucracy between Ministry of Pharmacy and Ministry of Health

5.2.2 Tourism and hospitality:

Lack of specialized travel agencies and tour operators working in the medical tourism sector is negatively affect the ability of the Egyptian market to spot and attract potential medical tourists. Such agents are required to coordinate and provide support services and to act as intermediaries between healthcare providers and medical tourists, and also to participate in marketing the destination.

Many tourism facilities are not well equipped for patients with disabilities. Resorts and hotels used by medical tourists have to be prepared to accommodate the special needs of patients. In addition, special dietary and nutritious food is still a relatively new trend at many Egyptian hotels, while this is an essential need for medical tourists who may suffer from chronic diseases like diabetes and hypertension.

Another weakness that affects the competitiveness of medical tourism sector in Egypt is the poor marketing and branding campaigns. Egypt's brand is greatly depending on conventional tourism in general with limited awareness of its medical tourism capabilities.

5.2.3 Healthcare:

“Hospital management” concept is not mature enough in Egypt's healthcare sector. There is an extreme overlap between healthcare management and ownership. Having a well-established “hospital management” concept shall enable medical tourism industry in Egypt to have effective and efficient providers who are able to offer competitive healthcare products. The current

managers of healthcare facilities in Egypt are mostly physicians with a limited formal education in healthcare strategic planning and management. They solely depend on experience with trial and error techniques.

Another critical point is related to the low healthcare staff (doctors and nursing) performance with related to customer care and personal communication skills. Healthcare staff quality is a critical success factor and one of the main attractors of medical tourists (Ben-Natan et al., 2009). This is mainly due to the unavailability of certified educational and training programs related to medical tourism. A development strategy is urgently needed in order to identify capacity building programs to upgrade nursing skills as effective communication skills, stress management, time management, and language skills.

Although Egypt has its national accreditation system, but most of Egyptian hospitals are yet to be accredited. Having and enforcing national or international accreditation systems is essential to provide the minimum healthcare quality assurance. Quality assurance systems should also be extended to support service suppliers and ambulatory clinics.

The current ambulance facilities serving the sector are not adequate. The current system requires a big infrastructure investment in order enhance responsiveness and ability to handle critical cases effectively and efficiently.

5.3. Opportunities of Medical Tourism Sector in Egypt

The international growth in the number of tourists in general, and for medical tourism in specific is creating a lucrative opportunity for Egypt to step in. Globalization and free trade had created and endless possibilities for enhancing the industry competitiveness if such tools are well utilized. Also Egypt's low labor cost along with the recent currency devaluation creates a favorable environment for attracting foreign direct investments to Egypt.

The advancement of technology in the last decade and the integration of up-to-date medical equipment and technological devices into the medical products offers an opportunity for Egyptian healthcare providers the opportunity to coin its medical tourism industry with advancement in technology and research. While a number of Egyptian healthcare providers have been able to adopt sophisticated technology, there is still a huge need to establish state-of-the-art research centers and medical institutes.

5.4. Threats of Medical Tourism Sector in Egypt

International and regional competition, especially from Jordan and UAE could pose a threat to the medical tourism sector in Egypt. Also political instability in the Middle East in general, and the war against terrorism in Egypt, throw it shades on the medical tourism sector.

CHAPTER SIX: DISCUSSION, CONCLUSION AND POLICY RECOMMENDATIONS

6.1. Discussion and Conclusion

Aim of this paper was to assess the competitiveness of Egypt's medical tourism industry, and to examine its ability to attract medical tourists. Medical tourism is a globally emerging industry that is rapidly growing. Many developed and developing countries had realized the promising return on investment in medical tourism, and took the necessary actions in order to enhance their competitive advantage. As one of the well-known conventional tourism destinations, Egypt has a great potential to compete with regional and international medical tourism industry players. In this study, the researcher had attempted in a systematic way to understand the current status of medical tourism in Egypt, and to clearly outline the strengths, weaknesses, opportunities, and threats of Egypt's medical tourism industry, and finally to come up with policy recommendations to the Egyptian government in order to develop, modernize and enhance the competitiveness and attractiveness of the medical tourism industry.

In order to understand what are the real motivators and determinants of the medical tourist preference for selecting certain destination. The researcher had examined the literature that describes medical tourism ecosystem in general, and specific countries experiences. Like any other consumer product or service, medical tourist's decision is determined by a number of demand and supply factors that vary in its weight according to each patient circumstances and preference. Those supply and demand factors are outlined in the integrated framework of medical tourism developed by Heung et al. (2010). The demand side in the integrated model outlines the factors that affect medical tourists' decision-making in terms of destination and

medical options. Those factors represent medical tourist's expectations according to specific needs. On the other hand, the supply side of the integrated model outlines all of the services, efforts and facilities offered by the medical tourism potential destination. It encompasses several pull factors that include existing infrastructure, modern medical facilities, and the quality healthcare.

Based on the demand and supply sides outlined in the integrated model, the researcher had developed a questionnaire that encompasses the all the factors that affects the medical tourist's decision-making. Those questions had been discussed with different stakeholders (11 interviewees) of the medical tourism industry using qualitative interview methodology. Interviewees had been selected from public and private sectors based on criteria that are clearly defined in the research methodology section of this study. The main purpose of the interviews was to examine if the medical tourism industry in Egypt could fulfill the supply and demand criteria of the integrated framework and to come up with the strengths, weaknesses, threats and opportunities of the medical tourism in Egypt. Findings from these interviews had been analyzed using the SWOT analysis technique and thoroughly discussed in details under Chapter 5.

The researcher had conducted several interviews with medical tourism industry stakeholders for public and private sector. In each interview, the researcher discussed the 14 point questionnaire that covers the whole spectrum of the integrated model. Interviews took place with public officials from MoHP, MoT, ETA and TCAC and private sector representatives. Input for different interviewees had been analyzed using the SWOT analysis technique based on

criteria defined by the medical tourism integrated framework. Based on the weaknesses defined by the interviewees, the researcher analysis had revealed the need for a comprehensive national strategy that aims to boost the medical tourism sector in Egypt. By carefully examining the current strengths and weaknesses of Egypt's medical tourism industry, and also articulating global and regional opportunities and threats, the researcher realized the crucial need to develop a comprehensive national development strategy for the medical tourism industry in Egypt. Based on the SWOT findings, the national development strategy should address four dimensions. Those dimensions are 1) enabling and enhancing medical tourism governance in public and private sector, 2) develop an Egyptian medical tourism product that is up to international standards, 3) enhancing and improving the capacity of healthcare and tourism workforce in order to gain the necessary expertise and skills to deal with this special type of international tourists, and 4) develop and integrate a comprehensive global and regional marketing strategy.

6.1.1 Enabling and enhancing medical tourism governance in public and private sector

Enabling and enhancing medical tourism governance in public and private sector is essential to realize Egypt's potential as a medical tourism destination. Different governmental actors such as the Ministry of Health and Population, Ministry of Tourism, and the Egyptian Tourist Authority should be working collaboratively in order to develop, implement and monitor the progress of such strategy. Also, private sector is an important stakeholder in enhancing the enabling medical tourism governance by creating a professional industry representation body which contributes in organizing, setting standards and lobbying for medical tourism development goals. On the other hand, the medical tourists – the most important stakeholder - rights have to

be regulated, protected and represented in order to ensure fair and adequate care, and to deal with any complaints that may arise.

6.1.2. Develop an Egyptian medical tourism product that is up to international standards

The second dimension that is the needed to develop premium medical tourism products that could appeal to potential customers. This goal could be achieved through developing national medical tourism standards that will define national tourism and healthcare minimum requirements for establishing and operating a facility that deals with this type of tourists. Also, achieving international accreditation for healthcare providers gains trust of the international medical tourism community in Egyptian healthcare facilities and would contribute to bridging the current image gap in the quality of medical services in Egypt. Also, forming strategic alliances with international healthcare providers should contribute in transferring the international know-how to the Egyptian market which could have positive implications of the medium and long term. Another crucial factor for developing a premium medical tourism product is attracting investments that aim to develop world class facilities that are up to the international standards. Developing hospitals, clinics and wellbeing resort that have the functional design for serving medical tourists will certainly boost the sector's ability to compete on international level. Also, improving support services such as ambulance, airline and ground transportation shall provide the necessary infrastructure for availing a high quality medical tourism products for international patients.

6.1.3. Enhancing and improving the capacity of healthcare and tourism

The third dimension in the proposed national strategy is related to enhancing and improving the capacity of healthcare and tourism workforce in Egypt. The goal of this dimension is to gain the necessary expertise and skills to professionally deal with this special type of international tourists. Developing human resources capacity could be achieved by improving medical and healthcare management education, provide medical tourism vocational training, form agreements with international medical tourism education providers, educate staff whether medical or support services to be able to communicate international patients with their language and to have a profound understanding to their cultural sensitiveness, enhance nursing care which is considered one of branding pillars for medical tourism industry.

6.1.4. Develop and integrate a comprehensive global and regional marketing strategy

The fourth and last dimension is the development and the integration of a comprehensive global and regional marketing strategy. Marketing is crucial in promoting and enhancing the visibility of Egypt as a regional and global medical tourism destination. Marketing should work on three dimensions, customer marketing, investment marketing and medical tourism conference destination marketing. Different industry stakeholders should work collaboratively in creating and implementing this strategy. Like any other product, delivering the right message to the right customer require using the right form of communication channel whether by conventional ways like conferences, media marketing campaigns and utilizing professional networks and industry alliances. On the other hand, technology provided an excellent opportunity for reaching customers through internet and social media.

6.2. Policy Recommendations

In order to realize Egypt’s potential as a medical tourism destination, four strategic dimension are proposed. It is important that all dimensions are addressed, as they are inter-dependent and the strategy will not succeed without strong action in each area.

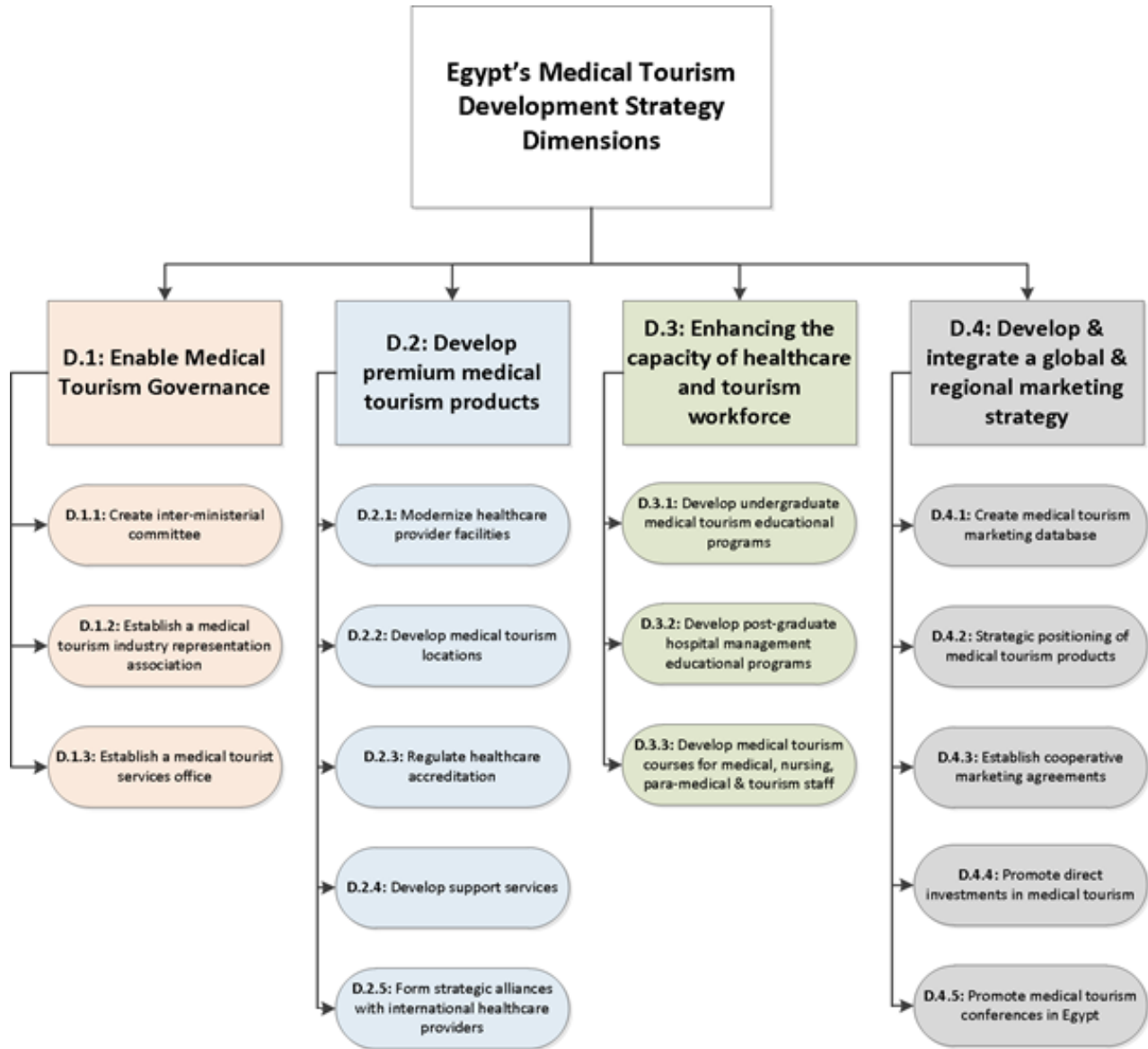


Figure 10: Egypt’s Medical Tourism Development Strategy Dimensions

Source: Author

6.2.1. Dimension 1 (D.1): Enable Medical Tourism Governance

D.1.1: Create inter-ministerial committee

Currently there is no well-established policy for the medical tourism industry sector. Responsibility for promoting the sector is distributed between the health and tourism ministries. The study recommends that an Inter-ministerial committee to be established. This committee should consist of the following members from the following entities:

- Ministry of Health.
- Ministry of Tourism
- Egyptian Tourism Authority
- General Authority For Tourism Development
- General Authority For Investment & Free Zones
- Supreme Council of Universities-Egypt
- Medical Tourism Industry Representative Association

The committee shall be responsible for coordinating the implementation of the strategy, monitor progress and report to the prime minister. The committee should have its own budget and a project manager for each dimension who will responsible for liaising the creation a detailed annual action plan.

D.1.2: Establish a medical tourism industry representation association

A medical tourism industry representation association should be established. The association should consist of the following members:

- Accredited medical tourism healthcare providers (e.g. hospitals, clinics, etc.)
- Accredited Spa and Wellness service providers
- Medical tourism facilitators and travel agents.
- Health insurance companies covering medical tourism services.
- Private educational organizations providing programs related to medical tourism.

The association should have an internal election mechanism, a yearly agenda and a fixed meetings schedule in order to oversee the implementation of medical tourism development strategy.

The role of the association could be summarized as following:

- Act as the industry official representative on the national and international level.
- Participate in the developing and implementation of the industry's development plans.
- Attract local and foreign investors to directly invest in medical tourism.
- Establish and liaise cooperative marketing with the governmental authorities.
- Suggest new policies, regulations, educational programs and marketing campaigns.

D.1.3: Establish a medical tourist services office

It is recommended that a medical tourist services office to be established. This office should act

as the customer care agent for international medical tourists that deals with any complaints or disputes between the patient and the healthcare provider. The office shall be under the authority of MOHP, and its role could be summarized as following:

- Receive international patient complaints and investigate them.
- Facilitate training for healthcare staff about the needs of international medical tourists
- Collect data and create customer satisfaction database, which could be utilized for policy suggestions, and quality improvement projects.

6.2.2. Dimension 2 (D.2): Develop premium medical tourism products

D.2.1: Modernize healthcare provider facilities

Currently, Egypt has no designated medical tourism providers. Some clinics specialize in tourism, in certain specialties as the treatment and rehabilitation of alcoholism, kidney dialysis. MOHP should encourage hospitals to develop their own capacity to accommodate this type of patients. By providing a state of the art hospitals designs, with an advanced medical technology, this will greatly enhance the ability of the Egyptian healthcare sector to serve this type of international tourists.

D.2.2: Develop medical tourism locations

The analysis clearly showed that medical tourism facilities are likely to flourish where they are very closely integrated with conventional tourism locations like the Red Sea resorts and the Mediterranean Coastline. The government is encouraged to provide investment incentives for private sector in those locations in order to attract more investments. Developing healthcare facilities is extremely expensive. However, Egypt has a profound record of attracting investment in tourism.

D.2.3: Regulate healthcare accreditation

Improving healthcare provider's capacity could be realized through obtaining international accreditation like the Joint Commission International Accreditation program, or a national scheme like the Egyptian Healthcare accreditation program. Governments represented by MOHP, should provide both regulations and incentives for encouraging hospitals to go

through the accreditation process. Till now, six hospitals in Egypt had been awarded this accreditation, which is extremely not adequate. Egypt has its own healthcare accreditation program

D.2.4: Develop support services

Improving support services such as ambulance, airline and ground transportation shall provide the necessary infrastructure for availing high quality medical tourism products for international patients. The main provider for ambulance services in Egypt is the Egyptian Ambulance Organization, which is a governmental entity. Enhancing responsiveness of the ambulance system and avail new services customized to medical tourism is crucial. On the other hand, equipping the Egyptian airports and national airlines with facilities and capabilities to handle medical tourists medical needs (e.g. air ambulance, handicap transportation, special entrances, etc.) shall provide an important competitive advantage.

D.2.5: Form strategic alliances with international healthcare providers

Another important approach in order to modernize healthcare delivery in Egypt is by forming strategic alliances reputable international healthcare organizations. Organizations like Mayo clinic; Harvard clinics; John Hopkins; Oxford University Medical School; and Cleveland Medical Centre have formed linkages and agreements with several hospitals in different countries. This kind of cooperation creates an enormous value for Egypt's healthcare sector by enhancing the sector's reputation, and regain international trust to our medical institution

6.2.3. Dimension 3 (D.3): Enhancing the capacity of healthcare and tourism workforce

Improving the capacity of healthcare workforce in Egypt, shall greatly impact the attractiveness of its medical tourism sector. The development of new training facilities and training programs should be regulated by Ministry of Health and Population, Ministry of Tourism and the Supreme Council of Universities (SCU) in Egypt. The education strategy should include the development of undergraduate, graduate and short courses for medical and non-medical personnel in order to provide the necessary skills to provide services according to the sector standards.

The following figure shows the classification of medical tourism workforce:

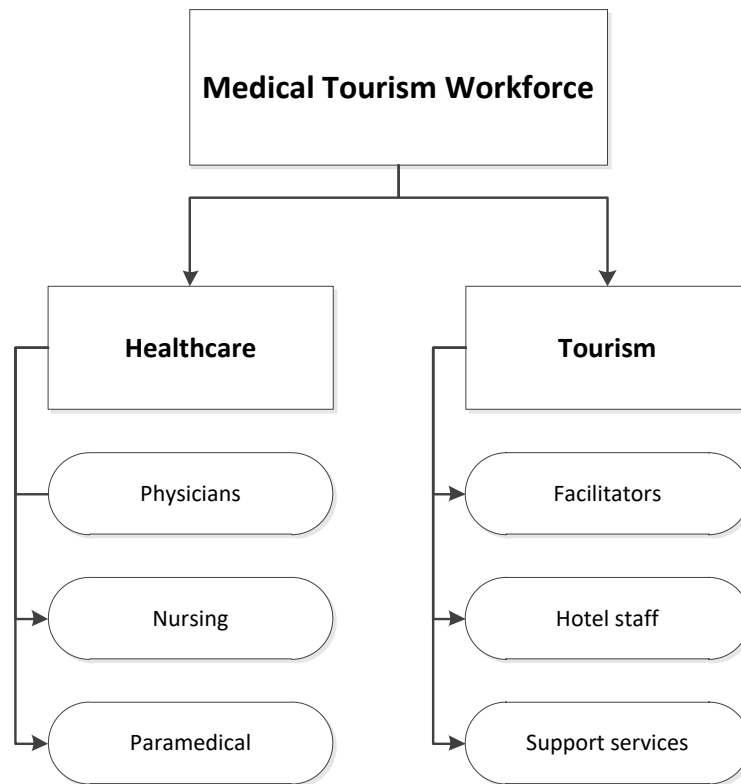


Figure 11: the classification of medical tourism workforce

Professional physicians and para-medical staff and should have a mandatory training programs for concepts and skills of medical tourism. This course shall utilize the the up-to-date techniques in the medical tourism sector. Reputable medical schools such as Harvard, Mayo , or Johns Hopkins with the cooperation of MoHP and SCU. Those training programs will be used to enhance the competencies of doctors working in medical tourism, and to market for Egypt's medical tourism product.

6.3.4. Dimension 4 (D.4): Develop & integrate a global & regional marketing strategy

D.4.1: Create medical tourism marketing database

In order to develop an effective marketing strategy, data about historical medical tourists flow, types of patients, and other data related to this sector is important in order to conduct the necessary market research. It is recommended that responsibility to create and maintain this database to be on the inter-ministerial committee mentioned in dimension 1.

D.4.2: Strategic positioning of medical tourism products

Egypt has to differentiate its medical tourism products from other competitor destinations in different aspects related to quality, uniqueness, ease of access, etc. This could be achieved by building a strong image of its medical tourism services to be perceived by the global market players, and to compete with regional medical tourism peers for offering better and more cost-effective medical tourism services.

D.4.3: Establish cooperative marketing agreements

Cooperative marketing agreement is an agreement to join and collaborate marketing efforts. Different public and private stakeholders in the medical tourism industry should form and sign agreements to jointly market Egypt's medical tourism regionally and globally. This role could be effectively played by the Egyptian Tourism Authority (ETA). One of the roles of ETA is to promote for medical tourism in Egypt, it also can cooperate with the proposed medical tourism industry association who represent the interests of private sector.

D.4.4: Promote direct investments in medical tourism

A new medical tourism investment policy should be marketed to international healthcare development companies. This could be done through direct marketing like conferences, or indirectly by a third party. The General Authority For Investment & Free Zones (GAFI) shall be the perfect entity who have the responsibility to market such policy in partnership with ETA and the rest of the sector's stakeholders.

D.4.5: Promote medical tourism conferences in Egypt

Conferences, international meetings and exhibition represent a golden opportunity to market different types of products and services. Branding Egypt as a favorable destination for medical tourism conferences could provide the sector a tremendous advantage for marketing its services to regional and global agents and customers.

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APPENDICES

Annex 1: Approval of Institutional Review Board

CASE #2016-2017-112



To: Magdi Ayoub
Cc: Mariez Wasfi
From: Atta Gebril, Chair of the IRB
Date: April 17, 2017
Re: Approval of study

This is to inform you that I reviewed your revised research proposal entitled "Medical Tourism in Egypt: Opportunities and Challenges" and determined that it required consultation with the IRB under the "expedited" heading. As you are aware, the members of the IRB suggested certain revisions to the original proposal, but your new version addresses these concerns successfully. The revised proposal used appropriate procedures to minimize risks to human subjects and that adequate provision was made for confidentiality and data anonymity of participants in any published record. I believe you will also make adequate provision for obtaining informed consent of the participants.

This approval letter was issued under the assumption that you have not started data collection for your research project. Any data collected before receiving this letter could not be used since this is a violation of the IRB policy.

Please note that IRB approval does not automatically ensure approval by CAPMAS, an Egyptian government agency responsible for approving some types of off-campus research. CAPMAS issues are handled at AUC by the office of the University Counsellor, Dr. Amr Salama. The IRB is not in a position to offer any opinion on CAPMAS issues, and takes no responsibility for obtaining CAPMAS approval.

This approval is valid for only one year. In case you have not finished data collection within a year, you need to apply for an extension.

Thank you and good luck.

A handwritten signature in black ink that reads "Atta Gebril".

Dr. Atta Gebril
IRB chair, The American University in Cairo
2046 HUSS Building
T: 02-26151919
Email: agebril@aucegypt.edu



Institutional Review Board
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Annex 2: Consent Form



Study Title: Medical Tourism in Egypt: Opportunities and Challenges

Principal Investigator: Magdi Maurice Marzouk Ayoub

SID: 800130321

Email: magdimayoub@aucegypt.edu

Cell: +201145492741

Dear Sir, you are being asked to participate in a research study. The purpose of this research is to assess the opportunities and challenges of medical tourism industry in Egypt within the Integrated Model of Medical Tourism framework. Based on the findings the study shall attempt to analyze Egypt's medical tourism industry current competitive advantage, and policies, entities and strategies needed to improve it.

- The expected duration of your participation is about 45 minutes.
- The findings may be either published or presented.
- There will be no potential certain risks or discomforts associated with this research.
- The data collected through the interview will be confidential as well as the name of the participant will be anonymous and will not be mentioned at any part of the research
- There will be no benefits to you from this research.
- The information you provide for purposes of this research is confidential.

Signature _____

Printed Name _____

Date _____

Company _____

Title _____

Annex 3: Interview Questions

What is your evaluation for the strengths, weaknesses, opportunities and threats for each of the following dimensions of medical tourism industry in Egypt?

1. Could you please introduce yourself, and describe your relation to medical tourism industry in Egypt?
2. Is the current healthcare infrastructure in Egypt (public and private) is sufficient for serving medical tourism industry in Egypt? Kindly, provide your evaluation and recommendations.
3. How do you evaluate Egypt's healthcare manpower capacity to handle international patients?
4. How do you evaluate Egypt's telecommunications infrastructure and its role in facilitating the growth of medical tourism?
5. How do you evaluate Egypt's transportation facilities, and its capacity to accommodate the needs of medical tourism industry?
6. Do you think healthcare costs in Egypt are competitive compared to other medical tourism destinations?
7. How do you evaluate the role of healthcare accreditation in adding value, and attracting medical tourists?
8. How do you evaluate laws and regulations related to medical tourism in Egypt? Do you think they provide the necessary legal framework for operating such an industry?

9. How do you evaluate current marketing, advertising and promotion activities done by governmental or private sector?
10. How do you evaluate the current political situation as determinant factor for attracting tourists in general, and medical tourists in specific?
11. How do you evaluate the cultural and social aspects related to medical tourism in Egypt?
Do you think we need to become a more tourist-friendly destination?.
12. How do you evaluate the current and projected economic situation in relation to medical tourism?
13. How do you evaluate the ecological and environmental situation in Egypt and its impact on medical tourism?