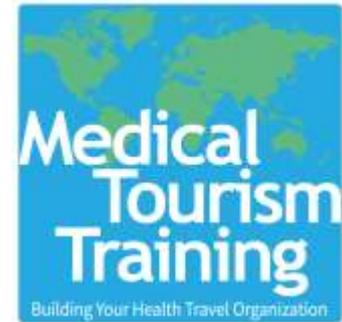


Medical Travel

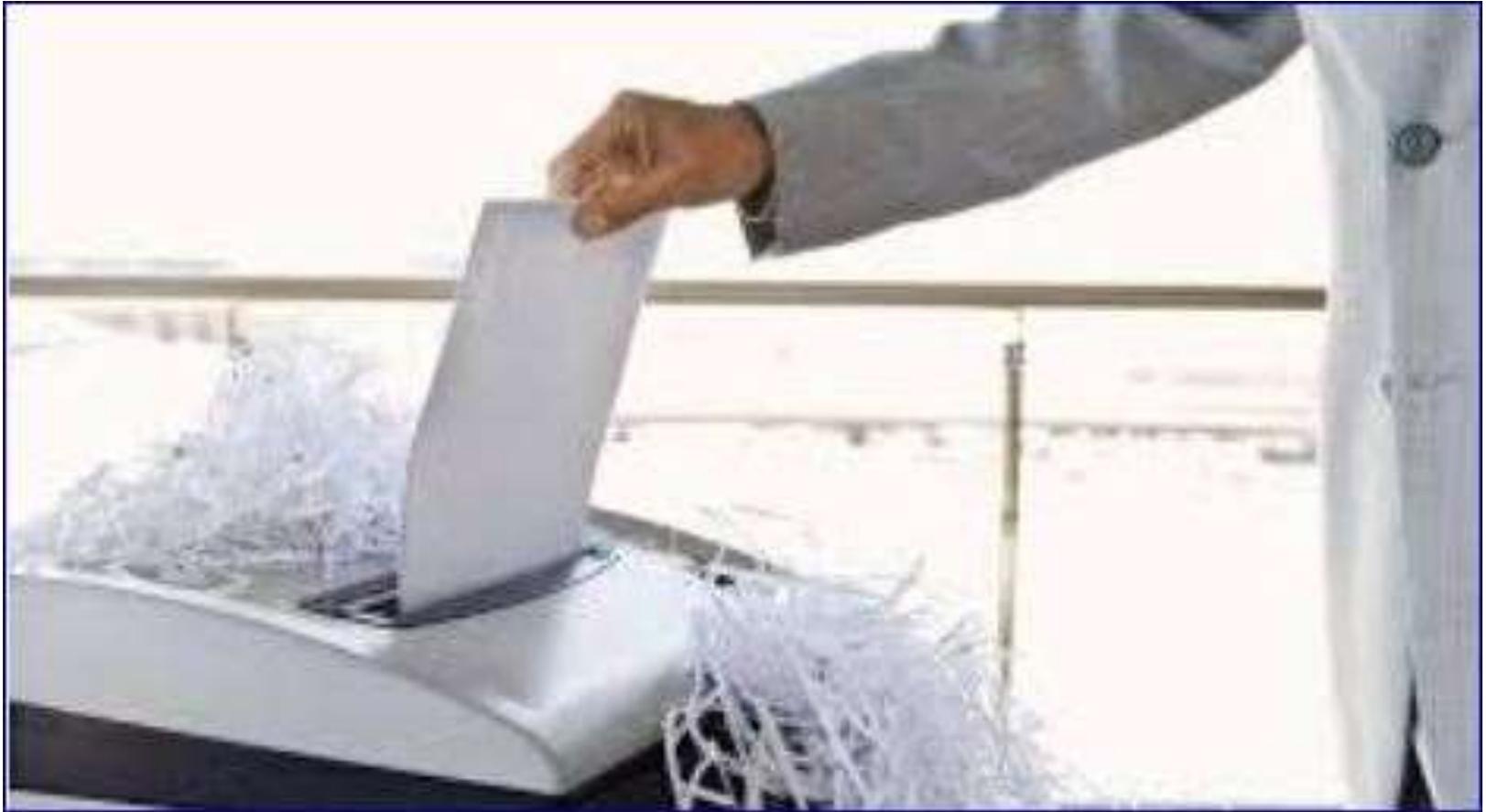
The Hybrid Future of International Healthcare

Cross Border Trade in Medical Services

Irving Stackpole, RRT, MEd



Medical Tourism?



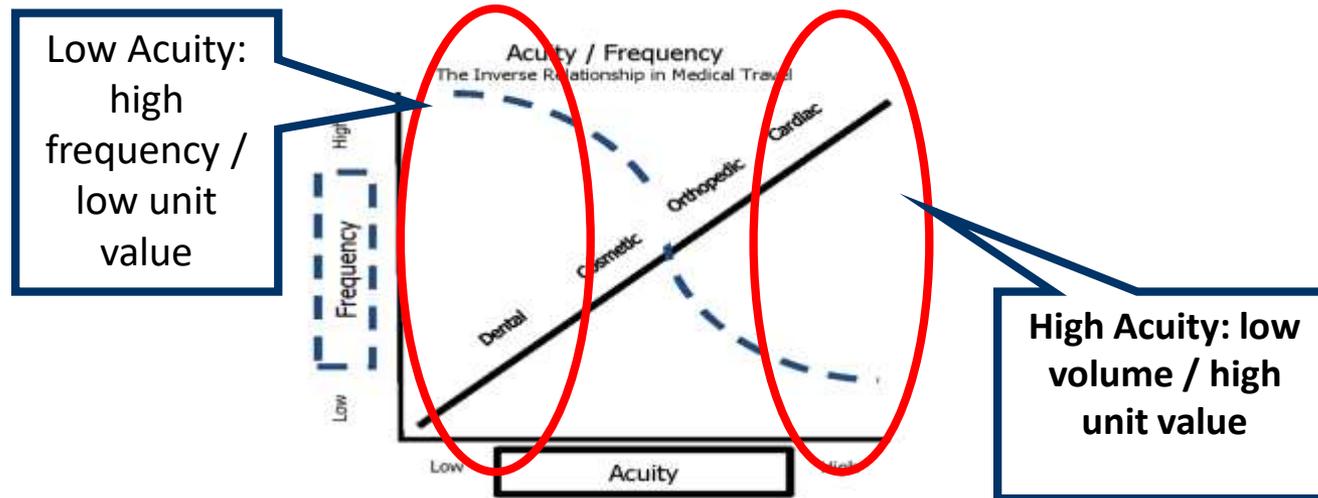
General Agreement on Trade in Services (GATS)

Typical understanding of “medical tourism”

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

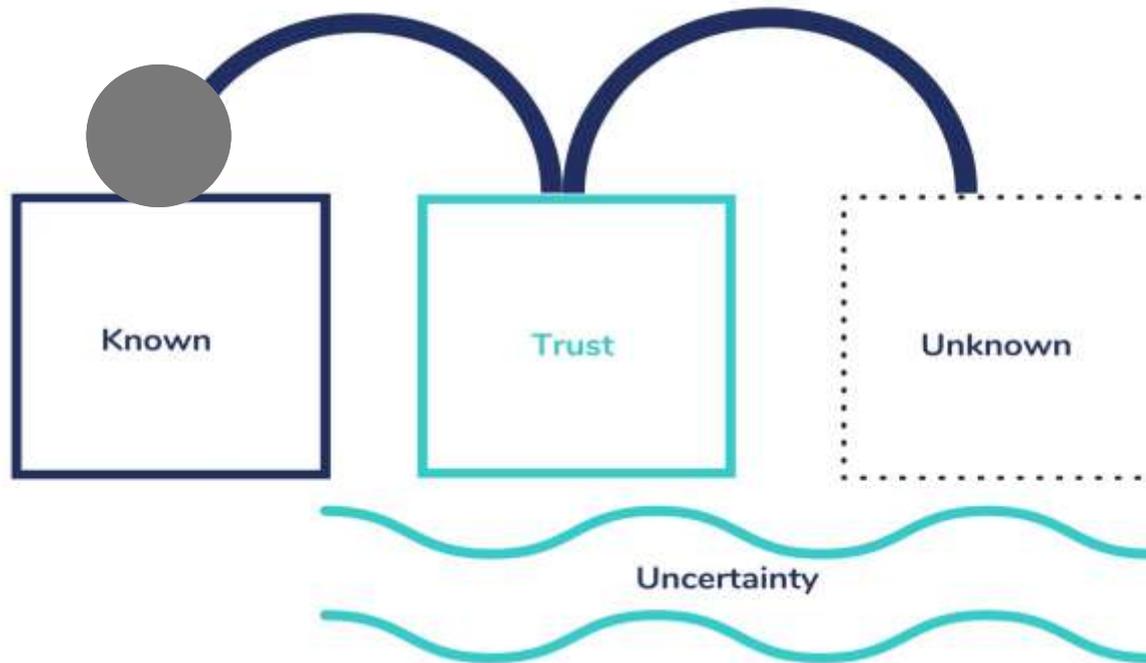
Health / Medical Tourism

- Traditional (Mode 2) segments



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

The Health & Medical Travel Journey



Cross Border Trade in Medical Services

• New models

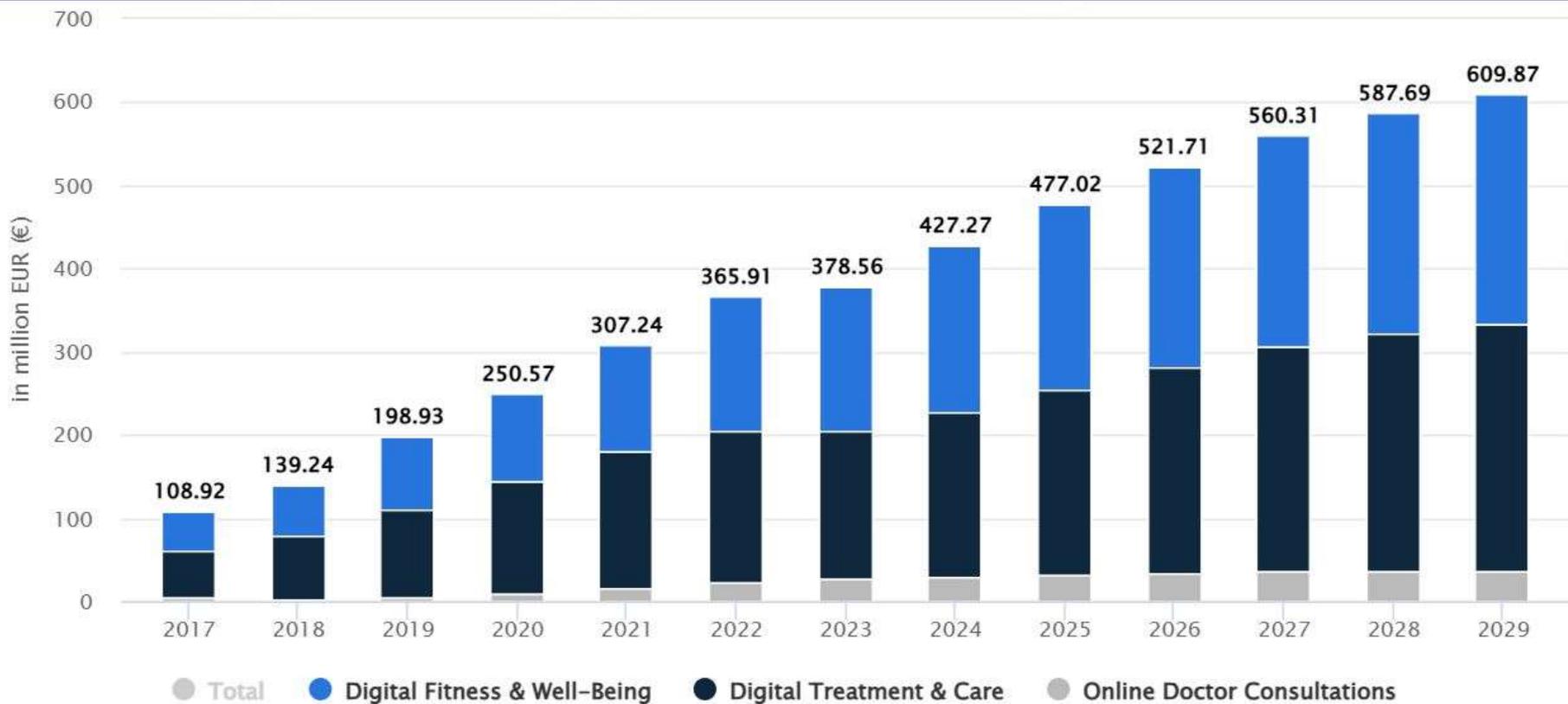
General Agreement on Trade in Services (GATS): Modes & Types of Trade			
Mode	Type	Trade in healthcare	Examples
Mode 1	Cross border supply of services	Trade across borders through electronic media; shipment of materials; analysis of information	Telemedicine; Transfer of images for evaluation and analysis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

Cross Border Trade in Medical Services

- **New models – Mode #1**
 - **Telemedicine**
 - **Post-COVID 19 - Great increase**
 - **Patients / clients really like it**
 - **Inter-American Development Bank found that in 2021, 17.4% of health professionals in Latin America use international telemedicine systems, but 20.6% intend to start**

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

Growth in Digital Health (Mode #1) - Colombia



Cross Border Trade in Medical Services

- New models – Mode #3
- Commercial Presence

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

The logo for Fresenius, featuring a stylized 'F' icon composed of three horizontal bars of varying lengths, followed by the word 'FRESENIUS' in a bold, blue, sans-serif font.The logo for Quirónsalud, featuring a stylized leaf icon with a green and red gradient, followed by the word 'quirónsalud' in a lowercase, teal, sans-serif font.The logo for Steward Colombia, featuring a large, dark blue, stylized 'S' shape, with the words 'Steward' and 'Colombia' in a white, sans-serif font below it.

Cross Border Trade in Medical Services

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

- **New models: Mode #4**
- **Medical Exchanges**
 - **Examples**

- European Health Data Space (EHDS) initiative aims to further expand cross-border health data exchange

Locally:

- Mercosur (Argentina, Brazil, Paraguay, and Uruguay) facilitating patient mobility and healthcare cooperation
- Agreement on Linked Border Towns (ALFV – 2019)

Cross Border Trade in Medical Services

- **New models: Mode #4 Medical Exchanges**
 - **Examples**
- EU & Pan American Health Organization (PAHO) signed a €3.8 million agreement to strengthen Latin American and Caribbean access to healthcare technology (2019)
- US National Institutes of Health has supported partnerships between US and Latin American

Conclusions

- Traditional “medical tourism” is limited
 - A person travels from one place to another place, receives treatment and goes back\
- There are #3 other forms for cross-border health / medical trade that can / will grow
 - Telemedicine
 - Commercial presence
 - “Medical Exchanges”: information / services / skills
- The “hybrid” future of international medical services!

Thank you!!

Irving Stackpole, President

Stackpole & Associates, Inc.



Mob (EU) +351 964 424 516

Mob (US) & WhatsApp

+1-617-719-9530

Skype

+1-401-484-6833

istackpole@stackpoleassociates.com

www.stackpoleassociates.com