Belize’s 2013 Blueprint for Success in Medical Tourism

Ann Kuffner
Belize Correspondent
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Belize Evaluates Medical Tourism as a Growth Opportunity

- Diversifies tourism industry and worldwide service offerings
- Allows Belize to expand into lucrative “niche” market
- Medical tourism represents opportunity for SMEs in Belize
- Would provide job opportunities for Belizeans – Women, young people


The objective of the Horizon 2030 Framework is to clearly establish a set of long-term development goals, targets, and indicators that will guide concerted action by all stakeholders involved in the development, implementation, and monitoring and evaluation of both long term and intermediate sector programs and Government’s long- and medium-term development strategies.
Belize′s Path to Medical Tourism

• 2012 – Belize entered into Technical Cooperation Agreement with Inter-American Development Bank and Beltraide, to assess resources under Compete Caribbean Program
  – Intent to refocus Beltraide′s efforts towards key sectors that can drive economic growth

• Summer 2012 - Massimo Manzi retained to develop a sector analysis and strategy for Medical Tourism
  – SWOT and benchmarking
  – Develop blueprint to achieve agreed upon goals
Belize Medical Tourism Sector Strategy

1. Competitiveness Diagnostic
2. Sector analysis
3. Rules of the game
4. Short, medium, long term vision
5. Work plan
6. Cluster structuring
7. Implementation

Short, medium, long term vision
BELIZE`S COMPETITIVENESS POSITIONING IN MEDICAL TOURISM

- Experience in dental tourism
- English speaking doctors and nurses
- Location – easy access
- Renowned natural tourism destination
- Retirement destination QRP
Belize’s Strengths as a Medical Tourism Destination

- English speaking doctors and nurses
- Branded natural tourism destination  
  – 200,000 tourists/yr from US and Canada
- Retirement destination – QRP Program  
  – 8000+ Americans live in Belize)
- Strategic location – easy access
- Experience with dental tourism
Weaknesses to Overcome

• Lack of accredited healthcare facilities
• Shortage of health professionals in certain specialties
• Lack of medical schools for clinical training
• Lack of medical equipment maintenance providers
• High costs of utilities
Potential Opportunities of Medical Tourism

• Upgrade training for local doctors through joint ventures with foreign doctors
  – Similar to successful Costa Rican approach
• Attract health & wellness related projects
• Attract Belizeans to return
  – 1 million Belizeans live abroad
  – Some are trained doctors and nurses
Threats to Medical Tourism in Belize

• Competition from Mexico and Guatemala
• New medical tourism projects in the Caribbean
• How quickly medical facilities can meet international healthcare standards
• Migration of health workers
• GOB/Beltraide commitment???
Key Components Required to Assure a Successful Belize Medical Tourism Strategy

Public private partnership

A COUNTRY project based on QUALITY, PATIENT SAFETY and CONTINUING EDUCATION

Common values and vision (the country first; the future Belize we want)

MEDICAL TOURISM IN BELIZE
Belize’s Approach - a Staged Three Component Strategy

• Local Healthcare Improvement Program
  – Help existing healthcare clinics/hospitals achieve international quality and patient safety standards

• Human Resources Development
  – Through training and continuing education

• Foreign Investment in Medical Tourism Projects
  – Attract foreign capital to develop state-of-the-art medical tourism projects
The proposed medical tourism model is a mixed model, based on the cooperation between local and foreign doctors.

Local and foreign healthcare professionals will jointly operate medical tourism projects.
Private Sector Commitment is Key

• Quality – Providers must submit to external, independent, international scrutiny
  – Accreditation from international medical tourism health quality group – AAAASF, AAAHC, etc.
  – Malpractice and General Liability Insurance

• Fair competition – all stakeholders must work together in favor of Belize’s best interests
  – The country’s interests come first

• Uniformity of message – BD
Minimal Requirements Must Be Met

• Medical tourism facilities must meet international healthcare standards

• Each facility must meet the 30 minute rule
  – Only Belize City facilities currently comply
  – Need new hospitals in remote locations
  – Or need reliable air transport
    • Helipads at medical tourism facilities???
# The Role of the Government

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<th>Ministry/Agency</th>
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| BELTRAIDE      | • Investment promotion  
                  • Corporate Buyers strategy |
| BTB            | • Country promotion (consumers)  
                  • Quality assurance of tourism services |
| MINISTRY OF HEALTH | • Licensing of clinics and hospitals |
| MEDICAL COUNCIL | • Licensing of health professionals |
| MINISTRY OF TRADE | • Incentives |
| TVET           | • Technical training (technicians, CPR, medical equipments maintenance) |
| MINISTRY OF FOREIGN AFFAIRS | • Promotion through the Embassies and Consulates |
Beltraide’s Role

• Leading the medical tourism effort in Belize
  – BELHEALTH
• Developed the overall business strategy
• Will assist investor groups to obtain special status for any new medical facility
• New medical tourism facilities will work with Beltraide for approvals and special exemptions
  – Customs duty exemptions
  – Tax exemptions
• BELHEALTH Contacts
  – Beverly Burke and Noriko Gamera
How will Medical Tourism Benefit Expats in Belize?

• Increased number/type of medical specialists and healthcare facilities
• Expat doctors are required to include/train local doctors, nurses and support staff
• Quality of health care facilities will improve
• New medical laws and regulations to be enacted
• More 24 hour hospitals (San Pedro and Placencia)
IMPROVED TRANSPORTATION
How will Medical Tourism Benefit Expats in Belize?

- Participating hotels and providers required to provide medical support services
- Improved infrastructure and options to facilitate emergency transportation
- Placencia international airport will be completed
- Emergency Response services and vehicles required
Where Will Medical Tourism Flourish?

• Targeted cities/regions
  – Placencia – first location
  – Ambergris Caye – second location?
  – Belmopan – teaching hospital
  – Belize City – upgraded clinics/hospitals
Foreign Investment: Geographic Areas

Protected from hurricanes, home of Government and Embassies personnel, strategic platform to visit Western and Southern tourism attractions.

Home of 80% of the existing medical and dental capacity, connected by the main international airport, destination for cruise ships. It is the “ready to go” destination for medical tourists to Belize, if...

High-end tourism destination, soon connected to the world by an international airport, home of amazing retirement resorts.
Human resources
- 241 Physicians
- 469 Nurses
- 126 Lab Technicians
- 41 dentists (2012)
- Future capacity
  - 200 doctors training outside Belize (150 in Cuba and 50 in other countries)
  - 25/40 graduated nurses per year

Academic
- 4 Offshore Medical Schools
- 1 Nursing and Allied Health School

Healthcare
- 4 private hospitals (Belize Medical Associates, Universal, Northern Medical Specialty Plaza Orange Walk, Loma Luz)
- 1 Tertiary Public Hospital (Karl Heusner Memorial Hospital) able to offer services to medical tourists (separate building)
- Ambulatory facilities (with potential to export according to BMDA)
  - 10 dental
  - 3 dermatology
  - 3 ophthalmology

Investment projects
- The Placencia
- Sanctuary of Belize
- Stem Cells Project in San Pedro???
- Facility in San Pedro (local/foreign capital)

Tourism
- 5-6 DMO (Tour Operators) with the capacity of properly developing medical tourism programs
- 2/3 Hotels with international standards in main destinations for MT (BC, San Pedro, Placencia)
- Airlines flying to Belize: American Airlines, US Airways, United, Taca, Delta
- Cruise Lines (265 calls in 2012)

Wellness
- Royal Wellness- Belize City
- Captain Morgan Retreat – San Pedro
- Secret Garden- Placencia
- Black Orchid Spa- San Pedro
- Las Terrazas- San Pedro
- Chaa Creek- Cayo
- Escape Day Spa- San Pedro
- Kaana- Cayo
- Healing Touch Day Spa- Caye Caulker

Supporting services
- Insurance providers (Atlantic Insurance, ING=medical tourism product, RF&G Insurance, ICB through Lloyd of London=malpractice)
- Banks

Mapping of the sector
Potential Investment Projects

• No projects “approved” as of yet

• Two projects being reviewed
  – Both in Placencia
Types of Potential Investments

- Fully integrated resorts with medical SPAS, dental clinics, recovery retreats
- Long term assisted living residential opportunities
- Teaching Hospital in the areas of Belize City or Belmopan
- Specialized Centers in Alternative Medicine (stem cells, cancer therapies, anti aging, rehab)
- Necessary major investments
  - International Airport in Placencia
  - Cruise ships dock
Sources of Foreign Capital Investment

- Doctors or doctor groups
- Hospital Groups
- Real Estate Developers
- Retirement Community Operators
- Long-term assisted living projects
- Hotel Chains focused on Hospitality in Health

- United States
- Canada
- México
The way to a successful country strategy

- Quality (regulation, accreditation, enforcement)
- Training and Education
- Investment and Export Promotion

• Implementation
  • Competitiveness Diagnostic
  • Sector analysis
  • Cluster structuring
  • Rules of the game
  • Work plan
  • Short, medium, long term vision
Staged Approach

• **Stage 1 – 1-2 years**
  – Foreign investments in innovative medical tourism projects
  – Foreign practitioners perform non-available surgeries and provide training opportunities to local professionals
  – Local clinics perform Phase 1 procedures in clinics in process of gaining accreditation
  – Technical and financial assistance to local operations
Staged Approach

• **Stage 2 – 2-3 Years**
  – Initial accredited local capacity
  – Foreign/local practitioners
  – Incentives for Belizean Nurses and Doctors to return to Belize
  – Foreign investments in more complex, comprehensive medical tourism projects
Staged Approach

• *Stage 3* - +5 Years
  – Significant accredited capacity
  – Significant Specialized local offer of practitioners
  – Foreign investments in Specialized medical tourism projects
Summary

• Detailed Medical Tourism Sector Strategy has been finalized
• Initial study is optimistic
• The three stage, phased approach is optimistic
• But improvements are expected
• Placencia, Ambergris Caye, Belize City and Belmopan will benefit first
CONTACT INFO

Ann Kuffner
Expat/consultant
hip55hop@hotmail.com
011-501-632-8966