Malaysia Healthcare
from local to global
Malaysia in general

• 30 million population
  - Distribution – 80% in West Malaysia, 20% in East Malaysia

• Cities
  - **KUALA LUMPUR** is the capital and largest city of Malaysia
  - Penang is the second largest city
  - Johor Bahru, Ipoh, Kota Kinabalu and Kuching

• Time: GMT+8 hours

• Climate
  - Tropical and the weather is warm all year round
  - Temperatures range from 21°C to 32 °C
Role 1: Public healthcare services provider

- 149 government hospitals (2014)
- 43,437 beds
- 3,122 health & mobile clinics
- 1,665 dental clinics (& mobile)
- Heavily subsidised – nominal or zero cost to the public at RM1 = US$0.23 for consultation by doctor with supply of drugs at the government outpatient primary care clinics

Kuala Lumpur General Hospital

- One of the biggest hospitals in Asia
- Largest hospital under the Ministry of Health Malaysia with 100 wards and 3,000 beds

Healthcare is the responsibility of MOH Malaysia
Role 2: Regulator

- Malaysian private healthcare is highly regulated for high quality care
- MOH monitors all safety requirements, outcomes and performance under the Private Healthcare Facilities and Services Act 1998 and Regulation 2006
  - 13th Fee Schedule provides for maximum chargeable fee for professional fees
  - 214 hospitals
  - 54 ambulatory care centres
  - 6,801 medical clinics

- Medical Act 1971
- Medicines (Advertisement & Sale) Act 1983
- Medical Device Act 2012
- Allied Health Bill 2015
- Traditional & Complementary Medicine is now regulated too
**Good supply of healthcare resources**

- Spends 4.3% of GDP on healthcare
- Total expenditure on health >US$10 billion (RM35.4bil)
- 1:633 doctor population ratio (46,916 doctors)
  *Target 1:600 (2015) and 1:400 (2020)*
- 1:333 nurse population ratio (89,167)
- 1:515 bed population ratio
- >30 medical colleges with yearly output of 4,500 Medical Officers and 1,000 specialists
Malaysia’s healthcare system consisting of a government-run universal healthcare (149 hospitals) and a co-existing private healthcare (268 private hospitals & ambulatory care facilities)

Wide coverage, at every 5km

Centres of Excellence & Areas of Specialities

- Cardiology
- Oncology
- Orthopaedics
- Neurology
- Ophthalmology
- Infertility treatment (IVF)
- Cosmetic Surgery
- Dental
- Medical health screening
Achieved higher standards & requirements for healthcare

**HEALTHCARE INDICATOR MALAYSIA 1957-2013**

<table>
<thead>
<tr>
<th>Year</th>
<th>Population (Mil.)</th>
<th>GDP (Healthcare %)</th>
<th>Life Expectancy</th>
<th>Infant Mortality Rate (per 1000)</th>
<th>Maternal Mortality Rate (per 1000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1957</td>
<td>8.2</td>
<td>6.5</td>
<td>59</td>
<td>75.5</td>
<td>2.8</td>
</tr>
<tr>
<td>1970</td>
<td>10.9</td>
<td>5.6</td>
<td>61</td>
<td>39.4</td>
<td>1.4</td>
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<tr>
<td>1980</td>
<td>13.8</td>
<td>6.7</td>
<td>67</td>
<td>23.8</td>
<td>0.6</td>
</tr>
<tr>
<td>1990</td>
<td>18.2</td>
<td>3.00</td>
<td>70</td>
<td>13.1</td>
<td>0.2</td>
</tr>
<tr>
<td>2000</td>
<td>23.4</td>
<td>3.28</td>
<td>72</td>
<td>6.5</td>
<td>0.3</td>
</tr>
<tr>
<td>2010</td>
<td>28.3</td>
<td>4.45</td>
<td>74</td>
<td>7.0</td>
<td>0.28</td>
</tr>
<tr>
<td>2013</td>
<td>29.9</td>
<td>4.30</td>
<td>74.8</td>
<td>6.6</td>
<td>0.26</td>
</tr>
</tbody>
</table>
Achieved higher standards & requirements for healthcare

Skilful and western trained **doctors** with vast experience and training in the public hospitals

2 + 2 + 8 = 12

- Internship
- Compulsory Service
- Compulsory Service for Masters/ Specialist Course

Most specialists have at least 12-15 years experience in public sector before they move to the private sector

- UK, USA, Australia, Malaysia trained
- Many sub specialty and most surgeons do minimally invasive surgery/ keyhole
Achieved higher standards & requirements for healthcare

State-of-the-art equipment and facilities

640 Slices CT Scanner
- captures a complete high-resolution image of the heart muscle in less than one-third of a second
- 10x more images than normal CT scanner
- create images of entire organs, moving joints and the build up of cholesterol in a single artery
- Able to detect cancers just 1mm across

Gamma Knife®
- to treat targets in the brain
- hits only the target, without damaging surrounding healthy tissues

3-TESLA MRI Scanner
- increased image clarity
- high-quality vascular imaging
- brain, spine, and musculoskeletal system
- maximizes patient comfort without compromising quality
Achieved higher standards & requirements for healthcare

Continuous quality improvements and safety in Malaysian healthcare arena

• Set-up in 1997. Brainchild of MOH, APHM and MMA

• Awarded the ISQua Accreditation certification on Standards and Organisation – accepted and is at par with other hospital accreditation standards in other country namely France, New Zealand, India, USA (Joint Commission International), Australia, United Kingdom, Canada and others.

80 hospitals
( 45 public, 35 private )

*As at 9 Apr 2015
Where is Malaysia in the global medical tourism scene?
Healthcare as the economic contributor

It’s a national agenda!

Healthcare Travel
identified as one of the Entry Point Projects to contribute to the national economic growth
MOH’s Role 3

Facilitate and promote the development of the private healthcare industry by providing stewardship and creating a conducive political, economical, social and regulatory climate for the healthcare industry to operate and grow.
Established in 2005 under MoH; stand-alone entity in 2009.

to promote Malaysia Healthcare internationally & grow the market share

to coordinate & facilitate efforts for the development healthcare travel industry;

Facilitate PPPs for a more focused strategy

Provide end-to-end services (e.g. MCL)

UK/ EUR

CH, KR, JP

AU/ NZ

SOUTH ASIA (BD)

GREATER ASEAN (ID, MM, VN, SG)

CIS (KZ)

MIDDLE EAST (OM, UAE, KSA)

Greater Malaysia Healthcare Travel Council (MHTC)
Average growth of healthcare travellers 23% between 2009-2014

Projected Growth for 2015
- 1 million arrivals
- RM1 billion revenue

Top 10 countries
- Indonesia
- India
- Japan
- China
- UK
- Nepal
- Libya
- Bangladesh
- Australia
- Philippines

Top 5 Treatments
- Orthopaedics
- Cardiology
- Health Screening
- Neurology
- IVF – 66% success rate, global average 50%
Average growth of healthcare travellers 24% between 2012-2014
Malaysia wins “International Medical Travel Journal (IMTJ), Medical Travel Destination of the Year Award 2015”

1. International **Dental Clinic** of the Year - Imperial Dental Specialist Centre
2. Best **Quality Initiative** – Imperial Dental Specialist Centre
3. Excellence in **Customer Service** - Gleneagles Kuala Lumpur
4. International **Cosmetic Surgery Clinic** of the Year – Beverly Wilshire Medical Centre
5. Medical Travel Website of the Year – Ramsay Sime Darby Healthcare
Global Recognition

2015 Public Private Partnership Medical Travel Destination of the Year”, Orlando, Florida (USA)

Malaysia tops in healthcare category
2015 Global Retirement Index by International Living, USA

“...damaged the cartilage in her knee...don't have to book an appointment to see expert medical staff on the island, and she got a walk-in MRI, diagnosis, and prescribed treatment schedule in one morning for just US$300...,” Ellen Ma (Canada) currently lives in Penang with her husband (17 July 2015)

Malaysia tops “Five Best Countries for Medical Tourism”
Nomad Capitalist, 5 Jan 2014

“Malaysia sees well over half a million medical tourists each year due to the country’s developed infrastructure and low costs...as Singapore gets more expensive, Kuala Lumpur is picking up the slack with facilities that are just as good. English is more widely spoken in Malaysia than in Thailand, and infrastructure is better than countries like India...”
“The only 10 countries that matter for Medical Tourism”

1. Mexico
2. Singapore
3. India
4. **Malaysia**
5. Israel
6. Turkey
7. Brazil
8. UAE
9. Thailand
10. Czech Republic

**The Future of Malaysia Healthcare**

**Short Term:**
Profiled as healthcare travel destination of quality, accessibility and affordability

**Mid-Term:**
To be the #1 healthcare travel destination in Asia

**Long Term:**
To be the #1 preferred healthcare travel destination in the world – “Top of Mind”
Are we there yet?

How do we get there?
Our Brand Promise

• Quality Healthcare – equivalent if not more advanced to other key players within the region

• Accessibility – ease of access to healthcare

• Affordability – competitive rates for quality care

• Ease of communication

Our Potential to Succeed

• End-to-End Seamless Care:
  
  Pre-treatment
  During treatment
  Post Care

Call Centre
Medical Concierge & Lounge
Wellness

• Muslim-friendly
• Asian hospitality, international care
World-class healthcare facilities; Internationally recognised

- Well-governed by strict regulations
- Stringent quality and safety standards set MOH
- National and International accreditations

Expertly trained healthcare professionals from reputable institutions in Malaysia, UK, Australia and USA

43 facilities under MHTC with accreditations

3 facilities + 29 facilities = 10 facilities

OR

3 facilities + 1 facility = 4 facilities
Affordable, Cost Competitive

- Procedure fee capped by Malaysian MOH → single pricing
- Favourable exchange rate (USD 1 = RM 4.30)
- Savings as high as 80% of the actual cost for some patients

Average Cost Comparisons (in USD)

<table>
<thead>
<tr>
<th>Procedure</th>
<th>US</th>
<th>Thailand</th>
<th>Singapore</th>
<th>Malaysia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heart Bypass</td>
<td>136,900</td>
<td>13,100</td>
<td>23,100</td>
<td>14,100</td>
</tr>
<tr>
<td>Heart valve replacement</td>
<td>114,100</td>
<td>15,600</td>
<td>28,800 (4 bedded)</td>
<td>13,400</td>
</tr>
<tr>
<td>Angioplasty</td>
<td>57,000</td>
<td>3,800</td>
<td>27,750</td>
<td>8,750</td>
</tr>
<tr>
<td>Hip Replacement</td>
<td>47,500</td>
<td>10,200</td>
<td>18,800 (1 side)</td>
<td>11,700</td>
</tr>
<tr>
<td>Hysterectomy</td>
<td>17,500</td>
<td>4,000</td>
<td>16,800</td>
<td>2,650</td>
</tr>
<tr>
<td>Knee Replacement</td>
<td>45,000</td>
<td>11,400</td>
<td>16,700 (1 side)</td>
<td>10,900</td>
</tr>
<tr>
<td>Spinal Fusion</td>
<td>81,000</td>
<td>8,050</td>
<td>20,000 onwards</td>
<td>10,900</td>
</tr>
</tbody>
</table>

Source: MHTC <Compiled from medical tourism providers and brokers online globally>
Affordable, Cost Competitive

Hospital’s Room Rates Examples: Prince Court Medical Centre

Suite - RM1,288/day  US$300
Standard – RM250/day  US$58
We facilitate PPP

Work together with stakeholders across industries

Partnerships for greater success of the healthcare travel industry
“...To encourage private hospitals to expand their capacity, the Government will provide **tax exemption equivalent to 100% of qualifying capital expenditure** incurred for a period of 5 years for the construction of **new hospitals or for expansion/modernisation/refurbishment of existing hospitals**...for applications received from 1 January 2010 until 31 December 2014...” **Official Launch of MHTC, 21 Dec 2009**

“...new companies and existing companies engaged in expansion, modernization and refurbishment that provide private healthcare facilities to **at least 5% healthcare travellers from their total patients** be given exemption on income equivalent to Investment Tax Allowance of 100% of qualifying capital expenditure for a period of 5 years...” **The Budget 2015 Speech.**
MHTC International Call Centre

+603 2726 8688 (within MY)

1800 188 688 (outside MY)

Operating Days: Mondays-Fridays | 9.00am-6.00pm

Language supported: English, Bahasa Indonesia, & Mandarin

Other languages: Japanese, Arabic & Bengali (e-mail inquiry support only)
End-to-end Seamless Care

MHTC Concierge & Lounge

MHTC Concierge
Gate 5, Arrival Hall, KLIA

MHTC Lounge
Gate 8, Arrival Hall, KLIA

Penang International Airport 1st July 2014

COMING SOON
Preventive Wellness/ Post Op-Care

De-stress & Detox

Holistic Therapy

Physiotherapy

Speleotherapy – Himalayan Crystal Salts

Meditation in the limestone cave at The Banjaran Hotsprings Retreat, Ipoh, Perak
“We are very fortunate to possess a **strong foundation** to compete against the world’s best in healthcare travel. Malaysia has the **infrastructure**, the **facilities**, the **expertise** as well as the **regulatory** and **quality** framework to ensure that **safe, effective and patient-centred healthcare services** are being provided at **competitive prices**. Encouragingly, we are witnessing the growing trend of private hospitals and private healthcare providers offering high-end medical services to both local as well as foreign patients coming from all over the globe.”
Thank you