Overseas Development of Japanese Medical Care
- Toward a Medical Industry that Meets Global Demand -

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24th October 2013
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2. Superior Medical Technologies of Japan

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1. Healthcare Needs around the World

- Global expenditure on healthcare grew by an average of 8.6% annually from 2001 to 2011. Expenditure on healthcare as a percentage of GDP also rose by 1.0 point over the decade.
- With economic growth, longevity has increased and disease structures in each country have also changed.

**Total expenditure on health as % of GDP [World]**

<table>
<thead>
<tr>
<th>Year</th>
<th>Expenditure as % of GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>8.2%</td>
</tr>
<tr>
<td>2010</td>
<td>9.2%</td>
</tr>
</tbody>
</table>

**Top 3 causes of death by income group (2011)**

**Low-income countries**
1. Lower respiratory infections
2. HIV/AIDS
3. Diarrhoeal diseases

**High-income countries**
1. Ischaemic heart disease
2. Stroke
3. Trachea bronchus, lung cancers

Source: WTO “Top 10 causes of death”
2. Superior Medical Technologies of Japan

- The infant mortality rate and life expectancy in Japan are at the lowest level and highest level in the world, respectively, mainly due to access to homogeneous and high-quality medical services based on national medical insurance and the implementation of advanced mother and child health, symbolized by the maternal and child health handbook. Therefore, Japan’s health and medical service system is rated highly internationally.

- The promotion of medical peripheral services using Japan’s hospitable medical service infrastructure (prevention of diabetes, livelihood support services, etc.), which are not covered by public health insurance, as well as necessary home devices (healthcare devices, etc.) and medical ICT, including telemedicine, have also been developed through the world’s most advanced efforts.

Life expectancy (2011)

83 years old
(First place among 195 countries)
* Same rank as San Marino and Switzerland

Source: WHO “World Health Statistics 2013”

Infant mortality rate in OECD countries (2011)

Source: OECD Health Data 2013
In Japan, a country where people live long lives, one in two people faces the risk of cancer. In response to this, progress has been made in superior diagnostic technologies and treatment technologies.

Source: OECD Health Data 2011.
3. Japanese Medical Care Has Not Contributed Enough Overseas

- Western companies hold a dominant share of the global medical device market, while Japanese companies occupy a low share (e.g., Toshiba Medical Systems Corporation ranks 16th and Olympus Corporation ranks 18th).

- By expanding medical services, medical devices, and medical technologies overseas, Japanese companies can aim at development while making overseas contributions in the future.

World shares by medical device

- Ultrasonography
  - GE 23%
  - Philips 21%
  - Toshiba 11%
  - Hitachi 11%
  - Mindray 3%
  - Others 6%
  - Samsung 6%
  - Esaote 5%
  - Siemens 10%

- CT
  - Siemens 26%
  - Toshiba 25%
  - Philips 15%
  - GE 32%

Sales of medical device companies around the world (2007)

(Million dollars)

- Toshiba
- Olympus
- Terumo

- Johnson & Johnson
- General Electric
- Siemens
- France
- Medtronic
- Philips
- Boston Scientific
- Covidien
- Smith & Nephew
- Stryker
- B. Braun Melsungen
- Zimmer
- St. Jude Medical
- Beckton Dickinson
- Abbott
- Danaher
- Synthes
- Alcon
- Gringeri
- B. Braun
- CI Bard
4. Placing Priority on Overseas Development of Medical Care by the Japanese Government

The Japanese government considers medical care as a priority area.

“Japan Revitalization Strategy—JAPAN is BACK— (cabinet decision on June 14, 2013)"

(Excerpt)

Through public-private sector joint efforts, capturing a share of the world’s infrastructure market that is expected to grow

Target:
◆ Raise infrastructure sales from the current 10 trillion yen to 30 trillion yen by 2020.
◆ Capture a 1.5 trillion yen (currently 0.5 trillion yen) share in overseas medical technology and service markets by 2020.

Establish around 10 Japanese medical centers by 2020, focus on emerging countries
Our goal
We aim to provide the world with a superior healthcare system, medical technologies, and hospitable medical services, all of which Japan has, to improve the level of healthcare in Japan and overseas.

Key point
Business feasibility needs to be ensured for long-term, extensive internationalization of medical services.
5-1. Measures Taken by the Ministry of Economy, Trade and Industry

We have worked on measures as follows:

**Overseas development support**
- Support for Japanese medical institutions and medical-related companies for overseas development with the aim of providing Japanese medical services overseas.

**Environment improvement for acceptance of patients**
- Improve the environment for people from overseas to receive safe treatment and examinations in Japan.

**International medical exchange promotion**
- Promote exchanges between healthcare professionals of Japan and overseas, and between medical institutions.
## 5-2. Overseas Development Support of Japanese Medical Technologies and Services

- Projects supported by the Ministry of Economy, Trade and Industry in FY2011

<table>
<thead>
<tr>
<th>Country</th>
<th>Project Name</th>
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<tbody>
<tr>
<td>China (Shanghai)</td>
<td>Japanese-style diabetes treatment services project (Terumo, etc.)</td>
</tr>
<tr>
<td>China (Beijing)</td>
<td>Japanese-style advanced mobile medical examination services project</td>
</tr>
<tr>
<td></td>
<td>(Asada General Hospital, BML, etc.)</td>
</tr>
<tr>
<td>China (Beijing)</td>
<td>Japan-China Dental Technology Research Center project</td>
</tr>
<tr>
<td>Russia (Vladivostok)</td>
<td>Japanese-style diagnostic imaging center project (Hokuto Hospital, PJL, Hitachi, etc.)</td>
</tr>
<tr>
<td>Russia (Moscow)</td>
<td>Project to develop and promote Japanese-style medical services</td>
</tr>
<tr>
<td>Vietnam</td>
<td>Telepathology and diagnostic imaging services project</td>
</tr>
<tr>
<td>Cambodia</td>
<td>Medical infrastructure and educational development research</td>
</tr>
<tr>
<td>Turkey</td>
<td>Republic of Turkey Hospital PPP Project</td>
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<td>China</td>
<td>Japanese-style diabetes clinic project</td>
<td>Brazil</td>
<td>Providing a Japanese-style cardiac medical examination system in Brazil</td>
</tr>
<tr>
<td>China</td>
<td>Japanese-style advanced mobile medical examination services project</td>
<td>Russia</td>
<td>Market research on advanced medical devices in Russia</td>
</tr>
<tr>
<td>China</td>
<td>International pathological diagnosis services project</td>
<td>Russia</td>
<td>Japanese-style diagnostic imaging center project</td>
</tr>
<tr>
<td>China</td>
<td>Demand surveys on expanding Tokushima-model lifestyle disease medical examination services in China</td>
<td>Indonesia</td>
<td>Project for opening Senayan Clinic</td>
</tr>
<tr>
<td>China</td>
<td>Demand surveys on establishing and business operation of rehabilitation clinics and training centers in China</td>
<td>Indonesia</td>
<td>Research on promoting regional specialized medical services in Java</td>
</tr>
<tr>
<td>China</td>
<td>Research on providing Japanese-style dental technician services and education in China</td>
<td>Indonesia</td>
<td>Field research on establishing an Indonesia/Japan joint center for the advanced diagnosis and treatment of gastrointestinal disease</td>
</tr>
<tr>
<td>China</td>
<td>Telepathology and diagnostic imaging services project</td>
<td>Myanmar</td>
<td>A Japanese-style breast cancer treatment package in Myanmar</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>Middle East Radiation Medicine Center project</td>
<td>Myanmar</td>
<td>Status surveys on blood operations in Myanmar</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>Promoting advanced cardiovascular products and providing medical education in the Kingdom of Saudi Arabia</td>
<td>Thailand</td>
<td>Overseas development of Kitasaito package dialysis</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>Status surveys on emergency care in Riyadh in the Kingdom of Saudi Arabia</td>
<td>Cambodia</td>
<td>Medical infrastructure and educational development research</td>
</tr>
<tr>
<td>Turkey</td>
<td>Field research on implementing the Republic of Turkey Hospital PPP Project</td>
<td>Iraq</td>
<td>Japan-Iraq Medical Cooperation Center (tentative name); developing human resources in Iraq</td>
</tr>
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5-2. Overseas Development Support of Japanese Medical Technologies and Services

✓ In FY2013, 29 feasibility research projects have conducted in 15 countries.
The Indian Government places importance on the diagnosis and treatment of cancer because the measures for “cancer control” and “heart diseases” are specified in the “India 12th 5 year plan” announced by the Planning Commission of India.

To meet the Indian needs, this project will research the possibility of expanding preventive health-care such as cancer screening in India and aim to construct a Japanese-style comprehensive cancer diagnosis and treatment center in the future.

**Project overview**

- The Indian Government places importance on the diagnosis and treatment of cancer because the measures for “cancer control” and “heart diseases” are specified in the “India 12th 5 year plan” announced by the Planning Commission of India.

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**Image of project implementation**

- **India**
  - Local patients
  - Hospitals and medical check-up Centers
  - Investing companies

- **Japan**
  - Collaborative medical institutions
    - Hitachi, Ltd ★ (Overall control)
  - Medical device manufacturers (Hitachi Aloka Medical, Ltd., etc.)
  - Investment institutions

- **Japanese-style Comprehensive Cancer Diagnosis and Treatment Center**
  - CT system
  - X-ray diagnostic apparatus
  - Ultrasonograph

- **Japanese-style Comprehensive Cancer Diagnosis and Treatment Center**
  - Dispatch doctors, development of human resources, remote diagnostic imaging
  - Compensation
  - Devices, maintenance
  - Compensation
  - Investment
  - Dividend

- **Indian context**
  - Treatment
  - Compensation
  - Right of utilization
  - Compensation
  - Dividend
  - Investment
In India, with the significant continuously growing economy, there has been a rapid increase in lifestyle-related diseases due to the change in lifestyles and eating habits. Therefore the Indian Government will take measures nationwide for cancers and heart diseases which stem from lifestyle-related diseases.

This project will research the possibility of the expansion of approaches in India which were conducted and produced effects in Japan. These approaches conducted for health maintenance and countermeasures for lifestyle-related diseases using simple household medical devices such as body composition meters and pedometers. In addition, this project will contribute to maintain and improve good health and will also enhance the dissemination of related Japanese medical devices by expansion of this approach in India in the future.
METI and Medical Excellence JAPAN (MEJ) held the first India-Japan business seminar on medical equipment and services in Delhi on 11\textsuperscript{th} September 2013. A lot of Indian medical professionals and Mr. Sibal, Minister for Communication and Information Technology, participated by Indian side. And Japanese medical equipment manufactures and Mr. Motegi, Minister of Economy, Trade and Industry, participated by Japanese side. In addition, we also held Exhibition for medical equipment to promote the exchanges between the India-Japan medical sector.

**Send public-private mission to India.**

**India- Japan Business Seminar on Medical equipment and services**

**Visit to Hospitals in Delhi and Chennai**

METI, MEJ and Japanese medical equipment manufactures visited the Rockland hospital in Delhi and Apollo hospital and Frontier Lifeline hospital in Chennai in 12\textsuperscript{th} and 13\textsuperscript{th} September 2013. We visited facilities and have a exchange of views about collaboration between India and Japan.
Japan’s government introduced the ‘Visa for Medical Stay’ in January 2011

◆ Characteristics of ‘Visa for Medical Stay’

<table>
<thead>
<tr>
<th>Scope of medical services</th>
<th>All types of medical care, from advanced forms of treatment to ‘Ningen Dock’ examinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple visas</td>
<td>Multiple-entry visas issued based upon need</td>
</tr>
<tr>
<td>Accompanying person(s)</td>
<td>Visas made available to accompanying family and/or other travel companions</td>
</tr>
<tr>
<td>Period of validity</td>
<td>Up to 3 years based upon need</td>
</tr>
<tr>
<td>Period of stay</td>
<td>Up to 6 months based upon need</td>
</tr>
</tbody>
</table>

Disadvantages of a conventional short-stay visa:

✓ Unsuitable for long-term treatment due to the short duration of stay

✓ A separate visa required for an accompanying person

◆ Example: Using the ‘Visa for Medical Stay’ to Receive Treatment in Japan

Middle-Eastern male: Evaluation performed by the receiving hospital showed a hepatocellular carcinoma condition requiring multiple hepatic arterial embolization. The patient was granted a multiple-entry ‘Visa for Medical Stay.’ Thus far, the patient has visited Japan twice to have treatment. One accompanying family member was also granted entry under the same visa.
5-3. Environment Improvement for Acceptance of Foreign Patients

- The Ministry of Economy, Trade and Industry promotes the development of an environment in which people from overseas can concentrate on examination and treatment in Japan without anxiety caused by language barriers and/or cultural differences.

- Development of international medical interpreters
- Development of health care coordinators
- Holding seminars for medical institutions about accepting people from overseas

**Comprehensive treatment**

**Before your visit**
- Contact with medical institutions in Japan, and proxy service for procedures necessary to receive treatment
- Support with visa applications

**During your stay**
- Medical interpretation and translation service
- Comprehensive support throughout your stay in Japan, and for those accompanying you as well

**After treatment**
- Arrangement of escort and transport to airport
- Confirmation of treatment course and support for follow-up examination by Japanese medical institution

**Responses to inquiries about healthcare in Japan**
- Contact with medical institutions in Japan, and proxy service for procedures necessary to receive treatment
- Support with visa applications

**Arrangements for airport pickup and transport**
- Medical interpretation and translation service
- Comprehensive support throughout your stay in Japan, and for those accompanying you as well

**Support for post-treatment follow-up examinations at a medical institution**
- Arrangement of escort and transport to airport
- Confirmation of treatment course and support for follow-up examination by Japanese medical institution
5-4. Support for Establishing Medical Excellence JAPAN

Aiming to efficiently implement overseas development of Japanese medical care, the Ministry of Economy, Trade and Industry supported the establishment of Medical Excellence JAPAN (MEJ).

Currently, not only the Ministry of Economy, Trade and Industry, but the whole Japanese government is promoting overseas development through MEJ.

◆ What is Medical Excellence JAPAN (MEJ)?

MEJ is a general incorporated association to promote the global development of Japan’s medical services through the combined efforts of the government and the private sector.

◆ The Functions of Medical Excellence JAPAN (MEJ)

✓ Promote international exchange between hospitals
✓ Promote international exchange between healthcare professionals
✓ Help Japanese medical services and technologies promote international expansion based on international needs
✓ Develop international human resources for healthcare services
✓ Point of contact for foreign patients
  Recommendations and referrals to medical institutions, translations of medical records, assistance with the visa application process, arranging lodging, interpretation services, and more.
✓ Overseas promotion of Japanese medical facilities with advanced capabilities
  Information disseminated through catalogs and websites.

http://www.medical-excellence-japan.org/
Languages: English, Chinese, Russian
MEJ can promote exchanges between Japan and other countries in the medical field.

*Currently about 50 institutions. Now increasing.*