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MINISTRY OF HEALTH-ETHIOPIA

የዜጎች ጤና ለሃገር ብልጽግና!  
HEALTHIER CITIZENS FOR PROSPEROUS NATION!



# Ethiopian Medical and Wellness Tourism Strategic Road Map

2025-2034 G.C



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OF HEALING





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## Forewords



Ethiopia is the second most populated nation in Africa, with an estimated population of 133,988,901 as of January 2025. The country is home to a diverse range of people who speak approximately 80 languages, which is equivalent to 1.65% of the total world population. Ethiopia has one of the fastest-growing economies, with a Gross Domestic Product (GDP) of US \$205.1 billion, ranking 57th globally according to the IMF, and fifth in Africa, following South Africa, Egypt, Algeria, and Nigeria as the largest economies on the continent. Ethiopia's economic growth is projected to be 6.7% during 2024–2025. The country's Human Development Index has improved over time, rising from 28.3% in 2000 to 47% in 2018.

As global demand for medical and wellness tourism services continues to grow, we believe this presents an exciting opportunity for Ethiopia to establish world-class medical and wellness tourism, positioning itself as a leading destination for these services in the

Horn of Africa. Ethiopian public and private comprehensive specialized hospitals, specialty centers, and wellness facilities have been improving the quality of specialty and subspecialty healthcare and wellness services, aiming for world-class standards. With an abundance of natural beauty and an expanding wellness sector, Ethiopia is ideally positioned to attract global visitors seeking high-quality medical care and wellness tourism experiences. By leveraging our strengths in healthcare services and natural wellness offerings, we can attract international visitors looking for high-quality medical care and rejuvenating wellness experiences.

For the past decade, Ethiopian public and private health facilities have been implementing several key initiatives to advance medical and wellness tourism. These initiatives include investing in enhancing health infrastructure with state-of-the-art medical facilities and wellness centers to attract global patients. We are strengthening and establishing partnerships with international hospitals and specialty centers to ensure world-class standards of care and safety by signing memoranda of understanding with hospitals in India. Moreover, the Ministry of Tourism has been continuously promoting wellness tourism practices, including spas and adventure activities in our beautiful national landscapes and socio-cultural settings. We are also strengthening regulations to ensure that specialized health professionals meet worldwide safety and quality standards, enhancing our country's reputation as a trusted destination for medical and wellness tourists. We are branding Ethiopia as a medical and wellness tourism destination to raise awareness about our unique values, services, and the comparative benefits for medical value travelers seeking healthcare and wellness tourism.

Additionally, the Ministry of Health has been closely collaborating with Ethiopian Airlines and hospitality services to offer customized travel packages for medical and wellness tourists. I firmly believe that developing medical and wellness tourism will not only boost the economy but also significantly contribute to the health and well-being of visitors, thereby positioning Ethiopia as a preferred destination for both medical and wellness services.

**H.E. Dr. Mekides Daba**

Minister, Ministry of Health, Ethiopia



## Acknowledgement



Ethiopia's National Specialty and Sub-Specialty Service Roadmap (2020-2029) identified critical areas for improvement in tertiary care, emphasizing the need for resource optimization and private sector partnerships to enhance access and quality. This roadmap served as the foundation for developing a dedicated Medical and Wellness Tourism Strategic Roadmap. Recognizing the resource-intensive nature of specialty and sub-specialty services, the medical tourism strategic roadmap aims to address two key objectives.

First, by developing high-quality, affordable specialty services within Ethiopia, the roadmap seeks to retain patients who currently seek treatment abroad. This will not only improve access to care for Ethiopians but also contribute to the development of domestic medical expertise. The goal is to position Ethiopia as a destination for medical tourists, offering competitive and specialized healthcare services to international patients. This initiative will generate revenue, stimulate economic growth, and further enhance the quality and availability of healthcare services within the country.

To guide this initiative, an evidence-based roadmap with a multi-stakeholder engagement model was employed. This high-level roadmap was developed using rigorous methods, including situational analyses and the identification of key strategic focus areas. The Ministry of Health (MoH) expresses its appreciation to MS-LEO for leading the groundwork of this roadmap. The Ministry also extends its gratitude to the Ministry of Tourism for its technical support in developing the roadmap. Finally, the Ministry acknowledges and deeply appreciates the continued commitment and contributions of the national technical working group, without whose dedication this roadmap would not have been possible.

The Ministry wishes to express its sincere gratitude to all the professionals and stakeholders whose contributions were essential to the development of the National Medical and Wellness Tourism (MWT) Strategic Roadmap (2025-2034). Their provision of vital information and technical support was invaluable. The MoH has also extended its special thanks to the national Technical Working Group (TWG) for their dedicated efforts and technical expertise, which were instrumental in the strategic roadmap's finalization and success. A full list of the core team and contributors is as follows.





## Core team

### **Dr. Elubabour Buno**

Lead Executive Officer, Medical Services lead executive offices MoH

### **Ermias Mulatu**

Head, Specialty and rehabilitation services desk MS-LEO, MoH

### **Dr. Gobena Godana (PhD)**

Specialty and Rehabilitation Service Desk Officer, MS-LEO, MoH

### **Dr. Simret Amha**

Specialty and Rehabilitation Services Desk Officer, MS-LEO, MoH

### **Meaza kasa**

Specialty and rehabilitation services desk officer, MS-LEO, MoH

### **Dr. Mekdem Tadesse (Sub-Specialist, Kidney transplantation)**

St. Paul's Hospital Millennium Medical College

### **Dr. Mohamed Aman (PhD)**

Senior Technical Advisor for The Minister, MoT

### **Dr. Mohamed Aliye (PhD)**

Officer, Policy, Strategy and research lead executive office, MoH

### **Dr. Samson Adera**

Ethiopian Medical Association

### **Dr. Moges Tadesse (PhD)**

Ethiopian public health association

### **Dr. Melash Gelaw**

Ethiopian National blood and tissues bank

## Contributors

### **Professor Sileshi Garoma**

Senior Advisor, State Minister Office, Health Services and Program Wing

### **Dr Abas Hassen, (PhD)**

Lead executive officer, Health services quality & innovation lead executive office

### **Dr. Yohannes Ayalew (PhD)**

Former President of Ethiopian development bank

### **Dr. Berhanu Ayana**

Addis Ababa University, College of Health Science

### **Lelise Nami**

Former Commissioner of Ethiopian Investment commission

### **Girma Seifu**

Head office of Addis Ababa investment commission

### **Melkamu Derese**

St. Peter Specialized Hospital

### **Dr. Hailu Seifu**

St. Paul's Hospital Millennium medical college





**Tamirat Kifle H/mariam**

Ethiopian, World Health Organization Country Office Ethiopia

**Nigatu Abate**

Ethiopian, Physiotherapy Association

**Mulatu Sisay**

Ethiopian private health federation

**Dr. Jiregna Mekonnen**

Specialty & Rehabilitation Desk Expert, MS-LEO, MoH

**Ashebir Lakew**

Technical advisor, Specialty and rehabilitation Desk MS-LEO, MoH

**Sirak Gugisa**

Head, Pre facility and referral desk MS-LEO, MoH

**Mabratu Tesfaye**

Pre-facility and Referral Desk Expert, MS-LEO MoH

**Elias Barako**

Pre-facility and Referral Desk Expert, MS-LEO MoH

**Esayas Melese,**

Former Technical Advisor, Clinical Services Directorate MoH

**Dr Ashenafi Beza**

Former Technical Advisor, Clinical Services Directorate MoH

**Alewiya Muzeyin**

Specialty & Rehabilitation Services Desk Officer, MS-LEO, MoH

**Daniel Girma**

Specialty and Rehabilitation Services Desk Officer, MS-LEO, MoH

**Dr. Abdi Dereje**

Specialty and Rehabilitation Services Desk Officer, MS-LEO, MoH

**Sisay Abera**

Specialty and Rehabilitation Services Desk Officer, MS-LEO, MoH

**Kasim Mohammed**

Specialty and Rehabilitation Services Desk Officer, MS-LEO, MoH

**Hailegebriel Abomsa**

Technical advisor, Health services quality and innovation lead executive office MoH

**Dereje Duguma (MD, MPH)**

State Ministers, Health Service and Program Wing





## Prefaces



As the Medical Services Lead Executive Office, we have been designing and developing various strategies, guidelines, programs, and interventions to enhance medical services accessibility and equity across health facilities in Ethiopia. Among these, expanding and strengthening specialty and sub-specialty services is one of our top priority areas. Despite our diverse efforts, our citizens still face difficulties accessing certain advanced services related to cardiology, oncology, orthopedics, transplantation, infertility, and other areas, which obligates them to travel to hospitals abroad.

Despite having a competitive advantage in medical and wellness services in East Africa, we have yet to fully utilize our potential. Thus, we have designed a Medical and Wellness Tourism Strategic Roadmap to position Ethiopia as a leading destination for medical and wellness tourism in Africa. We aspire to a future where these services are available within our country, ensuring our citizens have access within our territory, as well as providing services to our neighboring countries and beyond, ultimately contributing to economic development.

To achieve our desired future state, cascading the strategic roadmap through implementation guidelines, fostering multi-sectoral collaboration, and engaging the private sector are crucial. We need to invest more in & promote our medical services & rich wellness potential. I urge all of us to work tirelessly towards our envisioned future with a sense of ownership, determination & collaboration to establish ourselves as a premier MWT destination in Africa.

**H.E. Dr. Ellubabor Buno.**

Lead Executive Officer, Medical Services lead executive office

## Acronyms

<b>HSDIP</b>	Health Sector Development and investment plan
<b>AU</b>	African Union
<b>DBE</b>	Development bank of Ethiopia
<b>EAS</b>	Ethiopian accreditation services
<b>ECC</b>	Ethiopian customs commission
<b>EEP</b>	Ethiopian electric power
<b>EFDA</b>	Ethiopian Food and drugs authority
<b>EIC</b>	Ethiopian investment commission
<b>ENAO</b>	Ethiopian national accreditation office
<b>EPSA</b>	Ethiopian pharmaceutical and supply agency
<b>EPSS</b>	Ethiopian pharmaceutical and supply services
<b>ERA</b>	Ethiopian Road authority
<b>ERCA</b>	Ethiopian revenue and customs authority
<b>ESA</b>	Ethiopian space agency
<b>ETB</b>	Ethiopian Birr
<b>FDA</b>	Food drugs and supply agency
<b>FLB</b>	Federal Land Bank
<b>GDP</b>	Growth domestic product
<b>GWI</b>	Global wellness institute
<b>HoPR</b>	House of people representative
<b>IES</b>	Institute of Ethiopian standards
<b>IGAD</b>	Intergovernmental authority for development
<b>INSA</b>	Information Network Security Administration
<b>LEO</b>	Lead executive officer
<b>MoF</b>	Ministry of finance
<b>MoFA</b>	Ministry of Foreign affairs
<b>MoH</b>	Ministry of Health
<b>MoI</b>	Ministry of innovation
<b>MoIT</b>	Ministry of infrastructure and transport
<b>MoT</b>	Ministry of Tourism
<b>MoTL</b>	Ministry of transport and logistics
<b>MS-LEO</b>	Medical Services Lead Executive Office
<b>MT</b>	Medical Tourism
<b>MVT</b>	Medical value travel
<b>MVTF</b>	Medical value travel facilitators
<b>MWT</b>	Medical and wellness tourism
<b>NABH</b>	National accreditation board of Hospital
<b>NBE</b>	National Bank of Ethiopia
<b>NMWTB</b>	National medical and wellness tourism Board
<b>PESTLE</b>	Political, economic, socio-cultural, technological, legal & environmental
<b>SDG</b>	Sustainable development Goal
<b>SWOT</b>	Strength weakness opportunity and threats
<b>TPA</b>	Third part administration
<b>TV</b>	Television
<b>TWG</b>	Technical working Group
<b>UN</b>	Unit Nations
<b>UNESCO</b>	United Nations Educational, Scientific and Cultural Organization





## Executive summary

Medical tourism occurs when an individual travels across borders to seek medical treatment, whereas wellness tourism is associated with the pursuit of maintaining or enhancing one's well-being. This includes rest, disease prevention and management, and lifestyle enhancements. Medical tourism has two components: inbound and outbound, with an estimated global industry size of \$100 billion and a market growth rate of 10–20% per annum. In East Africa, research evidence suggests that an addressable market size of more than \$175 million could be generated from medical tourism alone. Ethiopia has significant competitive advantages to become one of Africa's most preferred and leading medical tourism destinations within the next 5–10 years.

To become a target destination for medical tourism, a country needs to assess the positioning of its healthcare sector in terms of its capacity to accommodate tourists. This assessment should consider the healthcare needs of the local community and address challenges such as the feasibility of international travel, the continuity of treatment or check-ups, and the differences in language, culture, and legal issues, including the lack of regulations.

The roadmap envisions positioning Ethiopia as a leading destination for medical and wellness tourism in Africa, establishing Ethiopia as a premier medical and wellness tourism hub that contributes to economic growth, improves healthcare access and quality, and strengthens international relationships. To achieve this, nine service areas are proposed as priority services for driving medical tourism in Ethiopia: cardiac services, oncology services, transplant services, orthopedic services, infertility services, neurology services, rehabilitation services, critical care services, and diagnostic care services. In terms of wellness tourism, thermal/mineral spas and resorts, as well as health and wellness retreats, are potential areas for development and utilization. All these services will be provided based on pillars of evidence-based approaches, safety, people-centeredness, efficiency, and effectiveness. Financial sustainability will be achieved through public-private partnerships, government allocations, international development grants, ensuring robust funding for roadmap implementation.

Ethiopia offers a distinctive value proposition for medical and wellness tourists such as ancient healing traditions rooted in its cultural heritage, globally unique natural assets, cost-effective care, and emerging world-class facilities, positioning it as Africa's premier holistic health destination. To highlight its strengths, Ethiopia will be marketed as a medical and wellness tourism destination under the brand icon "The Origin of Healing," with the call-to-action statement "Come to the Origin of Healing." This branding will be supported by well-designed and tailored marketing and promotion strategies. The implementation of the Ethiopian Medical Value Travel and Wellness Tourism initiative will be led by a board. To fulfill its functions, the board will consist of advisory, technical, and executive committees. Key challenges including infrastructure gaps, regulatory hurdles, and market competition are addressed through phased investments, and adaptive policy frameworks to ensure resilience for investors and partners.



The roadmap will be implemented in a phased approach.

**Phase One:** This phase covers the first three years of implementation, with the primary objective of establishing a robust governance framework and supportive enabling policies that facilitate the growth and development of medical and wellness tourism in the country. It specifically focuses on establishing a national board comprising various committees, including an advisory committee, a technical committee, and an executive committee.

**Phase Two:** This phase encompasses the fourth to seventh years of the implementation roadmap, with the primary objective of enhancing the operational framework and service quality of medical and wellness tourism. This will be achieved by strengthening regulatory systems, fostering collaboration between public and private sectors, improving workforce competencies, and leveraging technology. Additionally, it will focus on facilitation-related programs such as medical tourism marketing, visa processes, and land acquisition.

**Phase Three:** The final phase covers the last three years of roadmap implementation, with the primary objective of solidifying and enhancing the sustainability and competitiveness of medical and wellness tourism. This will involve integrating comprehensive planning across sectors, improving service delivery and infrastructure, fostering continuous professional development, and leveraging technology for marketing and operational efficiency to ensure seamless experience.

In summary, for successful implementation, leadership ownership and buy-in at all levels, stakeholder alignment, multi-sectoral collaborations, ethical, efficient, and effective medical value travel facilitators, health insurance portability, an effective and efficient supply chain system, innovative approaches to handling human resource development, retention and engagement, digitalization, and innovative healthcare infrastructure funding models through public-private partnerships (PPP) modalities need to be explored.





# 1

## Introduction



# 1. Introduction

The tourism industry is considered one of the vital elements of the global economy., (1). It supports millions of jobs directly and indirectly related to tourism., (2). The industry encompasses several business disciplines, including sports, education, medical, and wellness tourism. (3),(4),(5).

## Medical and Wellness Tourism (MWT)

While the interest in medical and wellness tourism is not new, it has gained traction during globalization. Medical and wellness tourism are among the fastest-growing sectors in the international tourism industry. The main reason for this growth is the increasingly challenging social and economic circumstances. People are looking to shift their lifestyles to achieve better physical and mental health, thereby enhancing their overall “quality of life.” (6),(7),(8),(9),(10).

The availability of places that can heal individuals through various aspects of physical, spiritual, and social health is critical. To this end, medical and wellness tourism involves several dimensions of well-being, including physical, mental, social, sexual, emotional, cultural, spiritual, educational, occupational, financial, ethical, and existential aspects. Medical and wellness services may only be fulfilled in certain countries. In such cases, individuals in need seek these services abroad. Hence, medical and wellness tourism occurs when these individuals travel across borders to seek medical treatment and wellness services. ,(11). Medical and wellness tourism includes medical tourism, elderly tourism, disability tourism, thermal tourism, and thalassotherapy tourism. (12), (13).

## Medical Tourism

Medical tourism refers to traveling to hospitals and clinics abroad for medical treatments, primarily in areas such as cardiology, gynecology, neurology, ophthalmology, oncology, orthopedic surgery, transplants, preventive medicine, artificial insemination, anti-aging medicine, and plastic reconstructive surgery. Medical tourism is also known for medical travel, health tourism, healthcare tourism, and overseas medical care. More than a hundred million medical and wellness tourists travel worldwide each year. (14)(1),(15),(16). Medical tourism has two components: inbound and outbound. In 2012, it was estimated that a million medical tourists traveled worldwide for outbound/inbound medical tourism. The medical tourism industry is valued at approximately \$100 billion globally.

Medical tourism offers many benefits, including cost savings, high-quality care, specialty treatments, minimal waiting times, opportunities to visit new countries, and unique experiences. However, it also presents risks, particularly concerning the quality of postoperative care when medical tourists return to their home countries. Post-surgical care in hospitals in their home countries may not meet the same standards, and long-distance travel soon after surgery can lead to complications, such as thromboembolism (blood clot formation). ,(17).

Competition among countries to establish themselves as marketplaces for medical tourism is intensively increasing, driven by the offer of medical, surgical, and dental services, modern facilities equipped with the latest technologies, and appealing accommodations. Medical tourists are individuals willing to travel far from their home countries to undergo medical procedures, receive care, or seek consultations. Several countries have positioned themselves in this field based on the types of medical care they excel in, along with other appealing factors such as lower costs and the availability of advanced technologies.





Various studies indicate that the medical tourism market is estimated to grow at a rate of 10-20% per annum globally, with the overall market size potentially between \$24 billion and \$100 billion, serving approximately eight million cross-border patients annually. The average expenditure per patient in the medical tourism market is estimated to be between \$3,500 and \$5,800 per visit. Medical tourism provides significant economic benefits for several countries. For instance, the medical tourism industry in India generated around \$2.6 billion in 2012, accounting for 7-9% of its GDP. In Tunisia, the industry generated close to \$254 million in 2007, while South Africa harvested around \$184 million from medical tourism by the end of 2010.

In East Africa, research evidence has shown that an addressable market size of more than \$175 million could be generated from Rwanda's specialty services, including consultations with international experts and Rwandan stakeholders. The same study revealed that diagnostics, cardiology, oncology, and nephrology are the highest-demand specialty care services in the region, where, if executed correctly, medical tourism could generate around \$46 million in revenues by the end of 2023., (18),(19),(20).

### **Potentials and Competitiveness of Ethiopia as a Medical Tourism Destination**

Ethiopia possesses significant competitive advantages that could enable it to become one of Africa's most preferred and leading medical tourism destinations within the next 5-10 years. This potential can be realized by implementing various high-impact national strategies designed for its health sector. The country must go beyond the expected outcomes under universal health coverage while improving national efforts to provide world-class specialty medical services. This includes encouraging investors to offer specialized services and developing a highly skilled workforce within the country.


Medical tourism presents a unique opportunity to contribute to economic growth while ensuring that the goals of the Ethiopian Health Sector Development Implementation Plan (HSDIP) are met, specifically to provide affordable, easily accessible, and high-quality healthcare that will improve the population's health outcomes.

To become a target destination for medical tourism, a country needs to assess the positioning of its healthcare sector in terms of its capacity to accommodate tourists, taking into consideration the healthcare needs of the local community. It must also address challenges related to the feasibility of international travel, treatment continuity or follow-up care, and differences in language, culture, and legal issues, such as the lack of regulations.

### **Wellness tourism**

The Global Wellness Institute (GWI) defines wellness tourism as the "travel associated with the pursuit of maintaining or enhancing one's well-being," which includes rest, disease prevention and management, and lifestyle enhancement. This has led to a competitive tourism environment where destinations strive to fulfill various aspects to satisfy the increasing number of leisure travelers. , (21)

Wellness tourism involves voluntary travel to destinations worldwide to promote health and well-being through physical, psychological, or spiritual activities. It includes travelers who seek to enhance their well-being and life satisfaction through treatments that contribute to a higher quality of life. Wellness treatments and therapies aim to restore balance among the body, mind, and spirit, fostering equilibrium and harmony. The restoration and rebalancing of energy flow are essential for achieving overall well-being.



Wellness tourism can be categorized as either a primary or secondary activity, depending on the traveler's interest. A primary wellness traveler is motivated by wellness as the main reason for choosing their trip or destination, while a secondary wellness traveler seeks to maintain wellness during their travels or participates in wellness experiences while traveling for leisure or business. Thus, wellness tourism includes customers who travel to maintain their well-being and life satisfaction through treatment experiences that enhance their quality of life.

Health and wellness tourism encompasses various sectors, including medical tourism, elderly tourism, disability tourism, thermal tourism, and thalassotherapy. Wellness tourism represents a powerful intersection of two large and growing multi-trillion-dollar industries: tourism and wellness.

Over the last decade, wellness tourism has attracted increasing interest from both researchers and industry professionals. Wellness tourists typically look for resorts that can help them reset their lives, feel better, or even change their lifestyles. Many resorts use the term “wellness” to gain a competitive edge, catering to tourists seeking transformation in their lives. The wellness tourism industry generates approximately \$5.6 trillion annually. (21),(6). Ethiopia has significant potential to capture a share of the economic benefits produced by wellness and medical tourism; however, the country remains relatively underdeveloped in this sector.


While several studies classify wellness tourism as part of medical tourism, many scholars recognize it as a distinct sub-tourism segment. According to the Global Wellness Institute, medical and wellness tourism are standalone sectors serving different customer needs, preferences, and lifestyles. Wellness tourism encompasses four dimensions: body, mind, spirit, and environment. These components represent the pathway toward wellness and improving the quality of life, as indicated by consumer reviews. Various wellness tourism destinations and facilities are available, including spas, lifestyle resorts, and spiritual retreats. Such destinations are generally known as wellness destinations or wellness resort destinations.

### **Potentials of Wellness Tourism in Ethiopia**

Ethiopia can be a strong competitor among East and Horn of Africa countries in offering wellness tourism, as the country has much to offer. Wellness tourism in Ethiopia includes its natural surroundings, largely unaffected by human presence, where one can experience the wind blowing through the foliage, birds singing, and the sound of a stream bubbling through the woods.

Walking in the Ethiopian national parks includes mindfulness practices among the activities of a wellness-focused trip designed as a specialized program for those seeking adventure in this vast wellness terrain.

Specific types of wellness tourism in Ethiopia include treatments such as thermal and mineral springs medicine (hot springs), spas, body and mind care, nature and environmental experiences, as well as conventional, alternative, complementary, herbal, or homeopathic medicine. These offerings may target healthy tourists who want to maintain and promote their health or those seeking to recover from illness and heal bodily ailments. Individual wellness practitioners and programs provide diverse services, such as beauty treatments, exercise opportunities (including physical fitness and sports), meditation, healthy diets, weight management, health-related education, and relaxation and stress relief methods. These services can be found in luxurious, privately rented resort centers, small hotels or sections of larger hotels, and eco-locations such as jungles, private beaches, mountains, caves, volcanoes, and wildlife areas, as well as through traditional medicine practices.



In Ethiopia, wellness travelers can also access diverse services for stress control, including cultural therapy and spiritual tourism. This growing practice has evolved from religious pilgrimage into traveling to sacred spots in hopes of finding a special feeling.

### **Wellness Tourism vs. Medical Tourism**

Wellness tourism is often associated with medical tourism; however, it is not purely medical tourism. The two operate in separate domains and cater to different consumer interests. Medical tourism primarily addresses poor health through various medical treatments. Patients and their families are attracted by the availability, better quality, and/or fair pricing at the destinations. Therefore, the growth of medical tourism depends on the status of a country's broader medical sector and the enabling environment.

On the other hand, wellness tourism attracts consumers seeking activities and destinations that enhance their wellness lifestyle and help them proactively maintain and improve their health and well-being. The appeal and success of wellness tourism depend on an entirely different set of factors, business models, customer mindsets, human resources, and industry culture. It is more closely aligned with leisure, recreation, and hospitality.

The key drivers of the growth of medical and wellness tourism (MWT) are the affordability and accessibility of quality health services, the availability of the latest medical technologies and accreditations, minimal waiting times, and additional value-added hospitality services. Therefore, the integration of wellness services into packages can influence medical purpose travelers. The interconnections between wellness and medical tourism are essential for the development and mutual enhancement of each sector.

Developing the Ethiopian medical and wellness tourism roadmap aims to minimize the number of outbound medical and wellness travelers while attracting inbound medical and wellness tourists.

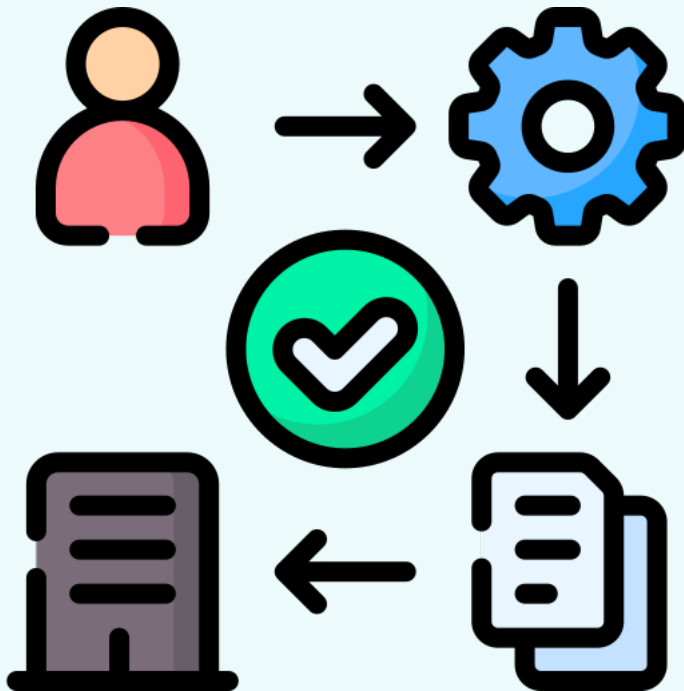
### **National Policy and Strategy for Medical and Wellness tourism**

The revised health policy of Ethiopia for 2024 recognizes medical tourism and service expansion by strengthening public-private partnerships in this area. To provide impetus for the growth of Medical Value Travel and wellness tourism in Ethiopia and to maintain the country's competitive advantage, a comprehensive strategic roadmap has been prepared and endorsed.



# 2

## Development process





## 2. Development process

### Development Process of the Medical and Wellness Tourism Roadmap

The development of the Medical and Wellness Tourism (MWT) Roadmap has been a significant undertaking within the Ministry. The initial drive for this roadmap emerged after the creation of the National Specialty and Subspecialty Roadmap, highlighting the need for a dedicated framework to guide the growth of MWT in Ethiopia.

A Technical Working Group (TWG) was established, bringing together representatives from various key organizations. Through a series of discussions, the necessity of a dedicated MWT Roadmap and its potential scope were explored. Following this, a comprehensive review of relevant national and international documents, including MWT strategies, best practices, and global market trends, was conducted to inform the roadmap development.

Subsequently, a series of consultative workshops were held to engage key stakeholders, including healthcare providers, tourism professionals, private industry experts, and representatives from relevant government organizations. These workshops facilitated open dialogue, feedback, and consensus-building. Additionally, to gather comprehensive data, detailed checklists were utilized to assess public and private hospitals across the country, focusing on key areas such as infrastructure, human resources, specialized medical services, medical devices, pricing, legal and ethical standards, accessibility, and integration with the tourism sector.

The collected data was analyzed to identify key strengths, weaknesses, opportunities, and threats (SWOT analysis) within the Ethiopian MWT sector. Based on this analysis, a comprehensive roadmap was developed, outlining major focus areas, action plans, timelines, and responsible agencies for implementation.

Throughout the development process, continuous engagement with key stakeholders, including the Ministry of Health, the Ministry of Tourism, the Ethiopian Medical Association, and other relevant government and private organizations, ensured that the roadmap aligned with national priorities and development goals. This comprehensive approach ensured that the MWT Roadmap is informed by a wide-ranging understanding of the existing landscape, incorporates valuable insights from key stakeholders, and provides a robust framework for the sustainable growth of the MWT sector in Ethiopia.

# 3

## Situation analysis





### 3. Situation analysis

The situational analysis of the Medical and Wellness Tourism (MWT) strategic roadmap is the process of collecting, evaluating, and organizing information regarding an organization's internal and external environments. This analysis aids in developing a mutual understanding of Ethiopian medical and wellness tourism. To develop this MWT roadmap, a desk review and a semi-structured interview approach were used to identify the SWOT, PESTLE, and stakeholder analysis of MWT in Ethiopia.

#### 3.1. SWOT analysis

A SWOT analysis involves assessing the MWT sector to identify internal Strengths and Weaknesses, as well as external Opportunities and Threats. It is evident that the growth of Ethiopia's MWT industry is closely related to the participation and involvement of local authorities, particularly government bodies, NGOs, the private sector, the transportation sector, tour operators, hotels, and hospitals. Additionally, there is a need to revise rules and regulations and to focus on MWT products that will generate a competitive advantage and differentiate MWT tourism offerings in Ethiopia.

Table 1 summarizes the internal and external factors impacting the MWT industry in Ethiopia, both now and in the future.



**Table 1: SWOT Analysis**

Strengths:	Weaknesses:	Opportunities:	Threats:
<p><b>Medical tourism</b></p> <p>Availability of specialty &amp; subspecialty strategy roadmap that guides the development of tertiary care service.</p> <p>Increased number of specialty &amp; subspecialty services and training programs.</p> <p>Availability of state-of-the-art medical facilities</p> <p>Availability of well-qualified health workforce &amp; well-equipped health facilities.</p> <p>Existence of well qualified medical practitioners &amp; surgeons at Ethiopian Hospitals.</p> <p>Increasing popularity of Ethiopia as a tourist destination in the East Africa</p> <p>Access to high quality of medical services with reasonable cost compared to other competitors in the field.</p> <p>Lower labor cost, transport, and hospitality costs (competitive service price)</p> <p>Increased investment in healthcare service expansion</p> <p>Existence of Social Health Insurance proclamation/ legal framework, and implementation of CBHI</p> <p><b>Wellness tourism</b></p> <p>Diversified tourist destinations: the presence of unique cultural, natural, and historical tourist destinations in the country</p> <p>Commitment &amp; readiness of the private sector for wellness tourism industry</p> <p>Affordability of wellness services</p> <p>Multiple natural attractions to develop wellness services (Thermal hot springs, mineral water, steams, etc.)</p>	<p>Lack of MWT policy that guides local or international investment.</p> <p>No campaign for Ethiopia as MWT destination</p> <p>No national accreditation board for MWT services accreditation at the international level</p> <p>Inadequate number of super specialty medical centers</p> <p>Lack of service quality assurance system for MWT services and certification system</p> <p>Lack of uniform pricing policies</p> <p>MWT was not combined with tourist destinations.</p> <p>Inadequate supply chain management</p> <p>Lack of incentives &amp; regulations for quality of care</p> <p>Lack of marketing &amp; promotion to attract MWT</p>	<p>MWT has priority in the home-grown economy.</p> <p>MWT recognized as the focus in the revised health policy of Ethiopia.</p> <p>Recent focus from the Government on new tourist destinations (e.g., Halala kela, Koisha, Gorgora &amp; Wonchi tourist sites)</p> <p>Improved connectivity: Telecom, road, globalization, etc</p> <p>Presence of world-class airline &amp; aviation hub</p> <p>Geographic location and favorable climate conditions for hiking, training, &amp; traditional medicine</p> <p>Rapid economic growth</p> <p>Increased demand for high-quality MWT</p> <p>High demand for wellness</p> <p>Demand from neighboring countries</p> <p>The presence of some highly qualified and experienced medical professionals in the diaspora community</p> <p>Natural destinations, diversified cultures</p> <p>Head Quarter to AU and UN regional agencies.</p> <p>Inflated cost of MWT in developed countries</p>	<p>Global and Regional political instability</p> <p>Shortage of foreign currency hinders timely procurement of equipment, supplies &amp; pharmaceuticals.</p> <p>Intense global and regional competition in the MWT market</p> <p>Increased market competition from existing MWT destinations</p> <p>Lack of international Accreditation</p> <p>Medical care not covered by the insurer.</p>



## 3.2. PESTLE Analysis

The PESTLE analysis explores the Political, Economic, Socio-Cultural, Technological, Legal, and Environmental factors that influence MWT.

**Political Factors:** The political stability of the country is a crucial factor behind any type of tourism development. Recognition of the country's peace solutions is of utmost importance for the development of MWT and is likely to foster growth.

**Economic Factors:** Economic conditions, including inflation rates in foreign currencies, impact the salaries of those associated with MWT. The country is developing medical and wellness tourism with the aim of reducing the estimated 100,000 outgoing patients to 50,000 and decreasing the estimated \$700 million in outgoing medical expenses to \$350 million. In other words, Ethiopia seeks to earn an estimated \$500 million annually from inbound medical tourism.

**Socio-Cultural Factors:** There is a growing awareness among the population regarding the importance of MWT, and many appreciate such developments for the country. The local population of Ethiopia is known for its hospitality, showing warmth and generosity toward tourists. Although there are differences in social class among tourists, the host population embraces these differences as a multicultural aspect of society.

**Technological Factors:** The use of technology in MWT is emphasized, with Ethiopia currently adopting and upgrading technologies in this field. The government's efforts to promote healthcare technology adoption, including funding for technology investments, have contributed to this growth.

**Legal Factors:** There is an increasing awareness of the legal aspects related to MWT. The government has established the Ethiopian Food and Drug Authority (EFDA) to regulate medical devices and pharmaceuticals in the country.

**Environmental Factors:** The challenges and opportunities of MWT are highlighted by various environmental factors. Ethiopia has implemented several policies to address these challenges, including promoting renewable energy sources, enacting environmental regulations to reduce pollution, and initiating programs to address water scarcity—such as afforestation initiatives, green policies, and water conservation efforts. The details of the PESTLE analysis are presented in Table 2.

**Table 2: PESTLE Analysis**

Political:	Economic:	Socio-cultural:	Technological:	Legal:	Environmental:
<b>Stability</b> Political Stability War and peace <b>Alliances</b> IGAD AU UN MOH & MOT <b>Regional relation</b> SSA countries East Africa countries <b>Trends</b> 2030 SDGs Young leadership	GDP \$248.972 Bi (2019) Budget 2022/23 (FY) 786.6 Bi ETB 34% is allocated to pro-poor sectors: education, health, road construction, water and energy, & agriculture Unemployment rate 17.5% (2012) Taxes rate revenues. 13.9% (2017) Poverty 25.7% below poverty line (2015) Inflation 15.7%, inflation rate Trends Young investors Online investment Market liberalization	Demography 120 m/people 70% are still in the agricultural sector. 25.2%; Unemployment The world's highest young population Differences in social class Multi-cultural society The well-being of local society People awareness Openness Trends Incoming tourism Entertainment activities	Research-development 2030: shift economic dependence The shift from an agriculture-led economy to an industry-led economy Industry zones. Agro-industry zones Trends Venture partners Tech incubators	Regulations MoH Health policy National Health Promotion strategic plan (2021/2-2025/6) MoT Tourism policy General Constitution Tax and employment laws. Legal clarity for hospitals Inappropriate budgeting Deficiency in technologies evaluation (import permits for high-end technologies & drugs) Trends Employment rights	Challenges Desertification Deforestation Higher diseases resulting from environmental pollution. Overconsumption of natural resources, like: -Agriculture -Higher Air pollution in cities -Water pollution -Urbanization Artificial disasters Green energy, cheerful outlook Green and organic products positive attitude

### 3.3. Stakeholder analysis

A proper Medical and Wellness Tourism (MWT) stakeholder analysis takes all interest groups into account. It considers the interests of shareholders as well as other groups that are directly or indirectly connected to MWT's decisions. MWT's stakeholders include employees, clients, suppliers, marketing collaborators, and the state and society.

A specific examination of their relationships with MWT allows for the early detection of risks and the identification of potential solutions. Undertaking a stakeholder analysis involves using a checklist to evaluate different interest groups throughout the decision-making process in four steps: defining stakeholders, analyzing their relationships, evaluating possible risks, and formulating an engagement plan.

**Table 3: Stakeholder analysis**

Stakeholder Name	What is important to the stakeholder?	How could the stakeholder contribute to the roadmap?	How could the stakeholder block the roadmap?	Strategy for engaging the stakeholder	Impact	Influence
<b>Ministry of Health</b>	<ul style="list-style-type: none"> <li>Establishing specialty and subspecialty centers</li> <li>Introduction and establishment of MWT centers</li> <li>Decrease abroad referrals and improve the quality of care/ service</li> <li>Improving the quality of service in the Country</li> </ul>	<ul style="list-style-type: none"> <li>Preparation of the MWT roadmap document</li> <li>Taking the initiative to coordinate all stakeholders in the realization of the document</li> <li>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</li> </ul>	<ul style="list-style-type: none"> <li>Not implementing the roadmap not and adequately engaging the right stakeholders.</li> <li>Not preparing the required standards and legislations related to the MWT</li> </ul>	<ul style="list-style-type: none"> <li>Preparing the MWT roadmap document</li> <li>Preparing a joint framework for MWT services</li> </ul>	High	High
<b>Ministry of Tourism</b>	<ul style="list-style-type: none"> <li>Improving the market and income generation of the sector</li> </ul>	<ul style="list-style-type: none"> <li>Participating in the preparation of the document</li> <li>Aligning the selected activities by the MoH to have a continuum of service (both MWT service)</li> <li>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</li> </ul>	<ul style="list-style-type: none"> <li>By not participating in the roadmap document preparation</li> <li>Not properly implementing the prepared document</li> <li>Poor readiness of the hostel and other natural tourist destinations</li> <li>No standards and legislations for MWT</li> </ul>	<ul style="list-style-type: none"> <li>Engaging in document preparation</li> <li>Forming a joint team to monitor the progress and implementation of the document</li> </ul>	High	High



Stakeholder Name	What is important to the stakeholder?	How could the stakeholder contribute to the roadmap?	How could the stakeholder block the roadmap?	Strategy for engaging the stakeholder	Impact	Influence
<b>Ministry of Finance</b>	<p>Strengthening the Country's economy by decreasing the hard currency loss</p> <p>Generation income to the Country from MWT centres</p>	<p>Based on the prioritized service areas, avail the required budget to realize the roadmap document.</p> <p>Modifying the respective Ministry policies in creating a favourable environment</p> <p>Creating incentive packages for investment in MWT</p> <p>Advocate the strategy document to their respective organization and organizations under their administration and follow closely with implementing the roadmap.</p> <p>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</p>	<p>Not engaging in the preparation of strategic document</p> <p>Not availing the required budget</p> <p>Not creating a favourable environment for investment by foreigners</p>	<p>Continuous engagement during the preparation of the document and being part of the SC</p> <p>Including their role and responsibilities in the roadmap</p>	High	High
<b>Investment commission</b>	<p>Identifying critical areas for investment and promoting the Country as one of the investment destinations</p> <p>Generation income to the Country from MWT centres</p>	<p>Promoting the Country as one of the MWT service investment</p> <p>Lobbying potential investors in the area</p> <p>Working closely with MoH and MoT in the TWG.</p> <p>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</p>	<p>Not endorsing the roadmap and incorporating it into their plans</p> <p>Not considering MWT service as one of the investment areas.</p> <p>Not allowing potential investors to invest in the Country due to the Country's policy</p>	<p>Continuous engagement during the preparation of the document and being part of the TWG</p> <p>Including their role and responsibilities in the roadmap</p>	High	High
<b>Ministry of Foreign Affairs</b>	<p>The Country becomes a destination for MWT</p> <p>Will strengthen the diplomacy and economic ties of Ethiopia with other sovereign countries in Africa</p>	<p>Creating an easy system for travelers to access their VISA</p> <p>Advocating MWT in every consulate around the world.</p> <p>Providing information and linking different investors with the responsible body</p> <p>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</p>	<p>Not providing VISA for clients promptly.</p>	<p>Continuous engagement during the preparation of the document and being part of the TWG</p> <p>Including their role and responsibilities in the strategy</p>	Low	High

Stakeholder Name	What is important to the stakeholder?	How could the stakeholder contribute to the roadmap?	How could the stakeholder block the roadmap?	Strategy for engaging the stakeholder	Impact	Influence
<b>Medical professional's Association</b>	<p>Will create job opportunities for a few professionals</p> <p>Will have access to skill improvement and transfer</p> <p>Will acquire new soft skills from other professionals</p> <p>Advocating professionals found in the Country to have international certified</p> <p>Advocating the health facilities to have international certifications</p>	<p>Advocating the MWT centers built in the Country for both local and international colleagues and the community</p> <p>Assisting MoH in prioritization and selection of the services that will be provided in those centres</p> <p>Assisting MoH in preparing different manuals, standards, and directives</p>	<p>Not advocating and promoting MWT</p> <p>Not engaging and supporting the MoH in the preparation of the different documents.</p>	<p>Continuous engagement during the preparation of the document and being part of the TWG</p> <p>Including their role and responsibilities in the strategy</p> <p>Ensuring the skill transfer and possible engagement of local healthcare professionals</p>	High	Medium
<b>Ethiopian Health Insurance Authority</b>	<p>Will strengthen the attitude and acceptance of health insurance</p> <p>This will strengthen the agency financially</p>	<p>Increasing the number of people enlisted in the health insurance system to use services in those centers</p> <p>Creating an affordable cost agreement with those centers</p> <p>Engaging different international organizations, embassies, tour agents, and banks to use the agency before linking with the centers</p> <p>Advocating for a strategy to all levels of the Government, non-governmental organizations, and countries</p> <p>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</p>	<p>Not advocating and promoting MWT.</p> <p>Not engaging and supporting the MoH in the preparation of the different documents.</p> <p>Not being able to incorporate and manage the insurance system for costly services.</p> <p>We are not reaching all community levels of the Country.</p> <p>Not endorsing the roadmap.</p>	<p>Continuous engagement during the preparation of the document and being part of the SC</p> <p>Including their role and responsibilities in the roadmap</p>	High	High

Stakeholder Name	What is important to the stakeholder?	How could the stakeholder contribute to the roadmap?	How could the stakeholder block the roadmap?	Strategy for engaging the stakeholder	Impact	Influence
<b>Ministry of Innovation and Technology</b>	<p>This will enable them to build a digital system for their service to the sector and earn a source of income.</p> <p>Producing innovative ideas and local production of medical devices for generating income for the Country</p>	<p>Strengthen the digitalization of work processes</p> <p>Advocacy and promotion service to MWT using the internet</p> <p>Testing and licensing different applications for their safety before implementing them in the MWT centers</p> <p>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</p>	<p>Not endorsing the roadmap</p> <p>Not participating in the digitalization of the MWT service</p> <p>Not advocating and promoting MWT on different websites</p>	<p>Including their role and responsibilities in the roadmap</p> <p>Ensuring the skill transfer and possible engagement of local experts</p>	Low	Medium
<b>Private Health Facilities Federation</b>	<p>Will benefit from the incentive packages set by the Government</p> <p>Generate income for their company and the Country</p> <p>Create job opportunities for the community</p>	<p>Strive to avail selected specialty and sub-specialty services to the local community.</p> <p>Establishing MWT centers in the identified services and locations</p> <p>Creating an international competitive quality service center</p> <p>Strive to make Ethiopia a destination for me MWT</p> <p>Make MWT service an economic solid backbone for the Country</p>	<p>Not advocating and promoting medical tourism</p> <p>Not engaging and supporting MoH in the realization of the roadmap</p> <p>Not having the capacity to establish and manage such type of services requires very huge investments</p> <p>Not endorsing the roadmap</p>	<p>Including their role and responsibilities in the roadmap</p> <p>Incorporating prioritized service areas and the locations in the roadmap</p> <p>Preparing attractive incentive packages for investors</p>	High	High
<b>National Bank of Ethiopia</b>	<p>Decreasing the foreign currency loss due to abroad referrals</p> <p>Increasing the countries' GDP</p>	<p>Incorporating the selected service areas into prioritized areas for accessing foreign currency</p> <p>Participating in the costing exercise of this strategy to have aligned goals</p> <p>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</p>	<p>Decreasing or halting hard currency access to potential investors</p> <p>Not endorsing the strategy</p> <p>Not promoting MWT for investors.</p>	<p>Continuous engagement during the preparation of the document and being part of the SC</p> <p>Including their role and responsibilities in the roadmap</p>	High	High

Stakeholder Name	What is important to the stakeholder?	How could the stakeholder contribute to the roadmap?	How could the stakeholder block the roadmap?	Strategy for engaging the stakeholder	Impact	Influence
<b>Development Bank of Ethiopia</b>	<p>Creating more job opportunities for the population.</p> <p>Strengthening the MWT industry</p>	<p>Prepare loans for such type of investment</p> <p>Advocating for MWT service in the Country</p> <p>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</p>	<p>Not preparing the required loans for potential investors</p> <p>Not endorsing the roadmap.</p> <p>Not promoting MWT for investors.</p>	<p>Continuous engagement during the preparation of the document and being part of the TWG</p> <p>Including their role and responsibilities in the roadmap.</p>	Medium	High
<b>City Administration Mayor offices</b>	<p>Job opportunities for the local community</p> <p>Address the health concerns of the community</p> <p>Increasing the local investments in those selected regions</p> <p>Increase income generation of money in that region.</p>	<p>Availing the required land for both the MWT services</p> <p>Assessing and identifying tourist attraction sites</p> <p>Advocating the MWT services provided in their respective regions for both the local and international community (especially for diasporas)</p> <p>Creating and sensitizing the community on how to create a welcoming environment for MWT tourists</p>	<p>Not preparing the required lands</p> <p>Not creating community awareness of the benefits of such investments.</p> <p>Not endorsing the roadmap.</p> <p>Not promoting MWT.</p>	<p>Continuous engagement during the preparation and informing them of the progress of the roadmap</p> <p>Including their role and responsibilities in the roadmap</p>	High	High
<b>Ministry of Education</b>	<p>Increased income from the service</p> <p>Increased number of internationally accredited institutions</p> <p>Improved quality of care</p> <p>Increased number of specialty and sub-specialty services</p> <p>Increased community trust in their institutions</p>	<p>They strive for international Accreditation of their teaching institutions found in the Country.</p> <p>Advocating for Accreditation of professionals graduating from those institutions</p> <p>Advocating work for MWT centers</p> <p>Capacitating and establishing new specialty and subspecialty services</p> <p>Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap</p>	<p>Not advocating and promoting MWT</p> <p>Not engaging and supporting MoH in the realization of the strategy</p> <p>Not enforcing universities to apply for international Accreditation</p> <p>Not preparing the required investments to strengthen the institutions</p>	<p>Continuous engagement during the preparation of the document and being part of the SC</p> <p>Including their role and responsibilities in the roadmap</p> <p>Working closely with MoH in fulfilling the requests of the institutions</p>	High	High

Stakeholder Name	What is important to the stakeholder?	How could the stakeholder contribute to the roadmap?	How could the stakeholder block the roadmap?	Strategy for engaging the stakeholder	Impact	Influence
<b>Chamber of Commerce</b>	Help in identifying additional sectors for investments Will use this in identifying new partners	Preparing different schemes of investment. Lobbying potential lenders and investors to realize the strategy Advocating MWT service Promoting MWT for local investors with the incentive package the Government prepared	Not advocating and promoting MWT Not engaging and supporting in the realization of the roadmap	Continuous engagement during the preparation of the document and being part of the TWG Including their role and responsibilities in the roadmap	Low	High
<b>Federal Land bank</b>	Using the prepared lands for their planned service. Achieving their plans Assisting different federal organizations	Preparing ideal locations for MWT centres Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap	Not providing lands for investors	Keep informed during the preparation of the roadmap Including their role and responsibilities in the roadmap	Low	High
<b>Ethiopian Ministry of transport and logistics</b>	Generate income by building the required infrastructures (like roads, availing vehicles, and airplanes) Increasing the number of flight destinations in Ethiopia (constructing airports)	Promoting MWT for the local and international community Building additional infrastructures required to get to the centers Working collaboratively with the MWT sectors to create a continuum of service for the clients Informing all agencies and institutions under its administration to work towards achieving the goals of the roadmap	Not working closely with the MWT sectors Not availing a standardized means of transportation Not increasing the number of airports and planes. Not promoting and advocating for MWT.	Continuous engagement during the preparation of the document and being part of the TWG Including their role and responsibilities in the roadmap	Low	High
<b>Institute of Ethiopian Standard (IES)</b>	Improved quality of service	Prepare minimum standards for MWT service Regulating the application of the standards.	Not preparing the required minimum standards Not regulating the implementation of the minimum standards Not promoting and advocating for MWT	Keep informed during the preparation of the roadmap Including their role and responsibilities in the roadmap	Medium	High



Stakeholder Name	What is important to the stakeholder?	How could the stakeholder contribute to the roadmap?	How could the stakeholder block the roadmap?	Strategy for engaging the stakeholder	Impact	Influence
<b>Ethio-telecom</b>	<p>Increase their revenue</p> <p>Increase the number of subscribers to their service</p>	<p>Increasing the quality of connectivity in the Country</p> <p>Increasing the access rate to connectivity</p> <p>Advocating and promoting of MWT</p>	<p>Not working to improve the access to connectivity in the Country</p> <p>Not improving the quality of connectivity in the Country</p>	<p>Keep informed during the preparation of the roadmap</p> <p>Including their role and responsibilities in the roadmap</p>	<i>Low</i>	<i>High</i>
<b>Ethiopia media outlets</b>	<p>Give stories for reporters to work on</p>	<p>Advocating and promoting of MWT</p>	<p>Not advocating and promoting MWT</p>	<p>Keep informed during the preparation of the roadmap</p> <p>Including their role and responsibilities in the roadmap</p>	<i>Low</i>	<i>High</i>
<b>Diaspora agency</b>	<p>Will be provided with the chance to support their Country</p> <p>Will be the beneficiary of investment</p> <p>Will be given a chance to have access to quality MWT service in their Country</p> <p>Will be saved from prohibitive health insurance costs</p>	<p>Advocating and promoting of MWT</p> <p>Investing in MWT</p> <p>Using their Country's health insurance systems.</p> <p>Supporting the Government in increasing access to foreign currency</p>	<p>Not advocating and promoting MWT</p> <p>Not investing in MWT</p> <p>Not supporting the Government in increasing access to foreign currency.</p>	<p>Keep informed during the preparation of the roadmap</p> <p>Including their role and responsibilities in the roadmap</p>	<i>Medium</i>	<i>High</i>
<b>Medical device importers</b>	<p>This will open a significant opportunity for selling their goods</p>	<p>Advocating and promoting medical and wellness tourism</p> <p>Investing in MWT</p> <p>Providing or availing quality medical devices to those canterers</p>	<p>Not advocating and promoting MWT</p> <p>Not availing quality medical devices</p>	<p>Keep informed during the preparation of the roadmap</p> <p>Including their role and responsibilities in the roadmap</p>	<i>High</i>	<i>High</i>
<b>Immigration Nationality and Vital events Agency</b>	<p>Efficient processing of visas and permits for medical and wellness tourists</p>	<p>Simplify and streamline visa application processes for medical and wellness tourists, provide clear guidelines and information (Online guides).</p>	<p>Impose strict regulations or delays in processing documents, leading to difficulties for medical and wellness tourists.</p>	<p>Establish regular communication channels, provide training on medical tourism procedures</p>	<i>High</i>	<i>High</i>



Stakeholder Name	What is important to the stakeholder?	How could the stakeholder contribute to the roadmap?	How could the stakeholder block the roadmap?	Strategy for engaging the stakeholder	Impact	Influence
<b>Ethiopian Accreditation Service (EAS)</b>	Accreditation of healthcare facilities and providers	Promote accreditation of healthcare facilities ensure compliance with national and international standards.	Refuse accreditation to facilities not meeting standards hindering their participation in medical tourism.	Collaborate with EAS to establish clear accreditation criteria, offer training, incentives and support to facilities	High	High
<b>Ethiopian Food and Drug Authority</b>	Regulation of pharmaceuticals and medical devices	Ensure importation and use of quality essential medicines and medical devices, establish quality control standards.	Impose restrictions on import or use of medical products used for subspecialty services, leading to shortages or lack of quality options	Collaborate with the authority to establish efficient import procedures, include infrequent drugs or supplies on the FDA list, and adopt various international standards.	High	High
<b>Ethiopia Pharmaceutical Supply Service</b>	Procurement and distribution of medical devices and pharmaceuticals	Ensure timely and efficient supply of medical devices and medicines to healthcare facilities.	Delays or disruptions in supply chain, leading to shortages and affecting patient care.	Establish partnerships with the EPSS & provide information on medical tourism demand for efficient procurement and distribution of medical devices & drugs.	Moderate	Moderate
<b>Ethiopia Customs Commission</b>	Customs clearance and duty procedures for medical equipment and supplies.	Facilitate smooth customs clearance for medical equipment and supplies.	Impose high tariffs or lengthy customs procedures, increasing costs and delays.	Collaborate with the commission to establish simplified procedures for medical equipment & supply imports, offer training on medical tourism regulations	Moderate	Moderate



# 4

**Vision, mission,  
Goal, and objective**





## 4. Vision, mission, Goal, and objective

**Mission:** To establish Ethiopia as a top Medical Value Travel and wellness destination by driving public private partnerships, investing in world class healthcare infrastructure, and marketing our competitive advantages- ensuring affordable, high quality care for patients while bosting economic gains for the country.

**Vision:** To position Ethiopia as a leading destination for medical and wellness tourism in Africa.

**Goal:** To establish Ethiopia as a premier medical and wellness tourism destination that contributes to economic growth, improves healthcare access and quality, and strengthens international relationships.

### Objectives:

#### Economic Impact:

- To increase foreign exchange earnings by attracting international tourists for medical and wellness services.
- To stimulate investment in healthcare and tourism, create jobs, and develop infrastructure.
- To promote local industries such as agriculture, manufacturing, and services that supply products and inputs to medical and wellness facilities.

#### Healthcare Access and Quality Improvement:

- To enhance the accessibility and affordability of healthcare services for both tourists and residents.
- To improve the quality of healthcare services by adopting international standards, technologies, and best practices.
- To expand the range of healthcare services available in Ethiopia, including specialized treatments, alternative therapies, and wellness programs.

#### Improving International Relationships:

- To foster collaboration with foreign countries in medical research, healthcare training, and patient referral.
- To enhance Ethiopia's reputation and visibility in the global healthcare and tourism markets.
- To contribute to global health goals such as universal health coverage and health equity.

# 5

## Enable environment for MWT Industry





## 5. Enable environment for MWT Industry

### 5.1. Need for strengthening the Ecosystem.

The ecosystem for medical and wellness tourism includes a host of service providers, facilitators, commercial agencies such as hotels and airlines, regulatory agencies, and the government. There is a need to establish linkages and a mutual understanding among stakeholders regarding the roles and responsibilities of different parties and to forge partnerships to promote the sector.

Wellness tourism should also become mainstream, as many travelers are seeking wellness experiences as secondary wellness travelers. This trend involves many players in travel, hospitality, and tourism destinations.

Medical Value Travel is a specialized service offered by hospitals and wellness centers, encompassing both modern medicine and traditional systems of medicine, such as natural hot springs, steam treatments, and other health-related services. It involves healthcare service providers, visa requirements, insurance, MVT facilitators, and more.

### 5.2. Organizing Medical Value Travel Facilitators

A Medical Value Travel Facilitator is an organization or company that seeks to connect a prospective patient with a service provider, typically a hospital or clinic. Medical Value Travel Facilitators (MVTf) are essential stakeholders in the entire MVT value chain, as they drive the business by generating leads from different source countries.

Medical value travelers rely on these facilitators for information about quality, safety, and legal issues. The facilitators also extend their services to include accommodation, transportation, medical visas, and more.

All medical value travel facilitators should be registered with the government, and efforts will be made to build their capacity and facilitate their growth and development. Registered Medical Value Travel Facilitators will be promoted on sector-specific and prominent Ethiopian medical and tourism portals.

### 5.3. Setting up of Association MVT Facilitators

Facilitate the establishment of an MVT Facilitators' Association to deliver quality services and standardize prices among all facilitators. The government can then engage with the Association to formulate policies and regulations and address the challenges that facilitators face. The government can also collaborate with the Association for the capacity building of MVT facilitators.

### 5.4. Categorization of MVT Facilitators and Their Accreditation

MVT facilitators can be categorized into silver, gold, and platinum categories based on their ability to meet predetermined criteria and standards established by an accrediting body. This categorization will provide greater transparency to patients and other stakeholders in the system and help determine pricing for the services offered.

### 5.5. Health Insurance Portability

Health insurance portability is a significant instrument for promoting MVT by extending patients' insurance coverage to the countries where treatment is sought. The following three options need to be explored:

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- 1. Establishing Presence:** Health insurance providers are virtually non-existent in many source countries. A joint MVT industry and insurance company group may explore setting up businesses in these countries.
  - 2. Partnerships with Foreign Insurers:** Foreign insurance companies active in the source countries may be approached to include Ethiopian hospitals in the insurance coverage provided to nationals of their home countries.
  - 3. Global Inclusion Framework:** A framework may be developed to establish the inclusion of Ethiopian health insurance companies (both private and government) in global markets such as Africa and East Asia. The possibility of directly employing hospitals and engaging international third-party administrators (TPAs) may also be explored.

## 5.6. Developing Medical Enclaves for Foreign Patients

Dedicated enclaves of hospitals may be created, consisting of various specialties. The import of equipment and other consumables may be allowed at concessional duties within these enclaves. Foreign super specialists may be permitted to practice in these hospitals. Additionally, innovative healthcare infrastructure funding models through pension funds, public-private partnerships (PPP), and long-term debt need to be explored.

## 5.7. Accessing air ambulance services

Licensed and certified air ambulances provide the highest level of safety and convenience for medical travelers. For instance, patients traveling for surgical procedures will require a lengthy recovery period before they can fly home commercially. By using an air ambulance, patients can return at their convenience, regardless of their global location. In certain cases, patients can have surgery in the morning and be back in their own bed that same evening if they choose. They can also rest assured that they will receive the same quality of care as they would in any hospital.

## 5.8. Developing a Special Wellness Tourism Zone

Many countries have developed cities that focus on nature, health, and wellness. Establishing special tourism zones with world-class facilities and wellness offerings linked to modern healthcare services will provide a competitive edge. Regional states should be encouraged to develop these special wellness tourism zones, and the federal government should provide the necessary assistance for infrastructure development. Suitable public-private partnership models need to be promoted.

## 5.9. Capacity-Building Enterprises and Staff

To ensure the quality of services, Ministry of Health (MoH) in collaboration with the Ministry of Tourism & the private sector health sector will lead the capacity-building programs to train paramedical and non-medical staff of the service providers in cross-cultural sensitivities. There should be focused language training for countries from which tourists come in larger numbers. Similar capacity programs will also be organized for MVT facilitators and wellness tourism operators.

## 5.10. Regional States and Destination Assessment for MWT

The Ministry of Tourism and the Federal Ministry of Health should conduct an assessment and ranking of destinations, with the critical objective of fostering competitiveness and proactively developing medical and wellness tourism values. This will be implemented as a capacity development exercise to encourage mutual learning among all states and support policy formulation and implementation.

The broad areas and action points for the ranking exercise will be drawn from global rankings of countries. This will also help prepare a specific report containing an analysis of the respective ecosystems for promoting wellness tourism, strengths, priority areas for the future, and best practices adopted by the regional states.

In conclusion, establishing an enabling environment for the medical tourism industry requires the following points:

1. **Government Support:** The government can provide financial incentives, tax breaks, and other benefits to encourage healthcare providers to cater to international patients.
2. **Infrastructure Development:** Building state-of-the-art medical facilities, hotels, and transportation infrastructure to international standards can help attract medical tourists.
3. **Regulations and Quality Standards:** Governments must establish clear guidelines for medical and wellness tourism, including the licensing and accreditation of healthcare providers, to ensure that visitors receive safe and high-quality care. Establishing quality standards for healthcare facilities, staff, and services can help build trust and confidence among international patients.
4. **Establishing a Medico-Legal Framework:** In health tourism, choosing the correct location is a fundamental legal factor. Patients must consider healthcare quality, legal regulations, language, general expenses, and the pros and cons of various countries. Medical tourism has opened doors for those seeking treatment outside their own countries. From obtaining a medical visa to receiving treatment and post-operative care, the legal aspects of medical travel highlight the need to understand the legal implications at every stage of travel. Medical visitors who are well-informed about legal regulations, patient rights, and dispute resolution systems will be able to embark on their healthcare journey with confidence, knowing they are aware of the legal factors supporting their pursuit of wellness across borders. Legal protections and rights afforded to medical visitors should grow with the industry to guarantee a safe and satisfactory healthcare experience.
5. **Collaboration with Stakeholders:** Building partnerships with local hospitals, tourism boards, and other stakeholders can create a support network that facilitates the development of the medical tourism industry. Collaboration among the government, healthcare providers, and other stakeholders is essential to ensure that medical and wellness tourism is sustainable and beneficial for all parties involved.

Creating an enabling environment for medical and wellness tourism requires a multi-faceted approach that involves collaboration among stakeholders, infrastructure investment, and effective marketing and promotion.

# 6

## Improve Human Resource Development and Management





## 6. Improve Human Resource Development and Management

Human resource development is a critical aspect of the success of medical and wellness tourism. To ensure that medical tourists receive high-quality medical and wellness services, it is essential to develop a skilled and knowledgeable workforce in the country. This involves providing training and education to healthcare professionals and support staff while promoting continuous learning and professional development. Additionally, it is crucial to cultivate a culture of patient-centered care, where healthcare providers prioritize the needs and preferences of medical tourists.

Developing a skilled and knowledgeable workforce for medical tourism destinations can be challenging. The shortage of healthcare workers with the appropriate skills and experience, particularly in specialized medical fields, is prominent. This scarcity may result in increased competition for talent, higher wages, and difficulties in retaining qualified workers. Another issue is the ongoing requirement for training and professional development, which can be costly and time-consuming. This is especially true for emerging medical tourism locations that may lack established training programs and resources.

To strengthen human resource development for Ethiopia's medical and wellness tourism sector, targeted strategies need to be implemented to address critical gaps in specialized skills, workforce retention, and international certification. Key actions include prioritizing overseas fellowships for doctors and nurses in high-demand fields mentioned in chapter 8 coupled with mandatory service agreements to control brain drain. Financial incentives, such as tax breaks and MWT-specific bonuses, will boost retention, while partnerships with local and global accreditation bodies will fast-track certifications for professionals. Adaptive training programs aligned with Ethiopia's disease burden and tourist demand will be delivered, with annual competency assessments.

Developing a skilled and knowledgeable workforce for medical tourism destinations requires significant investment, collaboration, and a continuous commitment to excellence. The Ministry of Health in collaboration with Ministry of education, universities, and private hospitals/sector will lead implementation. This will ensure a skilled, globally competitive workforce to elevate Ethiopia's MWT reputation and service quality.

# 7

## Strengthening Healthcare Quality and Accreditation







## 7. Strengthening Healthcare Quality and Accreditation

Strengthening healthcare quality and accreditation is crucial for ensuring that patients receive safe, effective, and high-quality healthcare services. This includes implementing systems for monitoring and evaluating healthcare performance, identifying areas for improvement, and applying evidence-based practices to improve patient outcomes.

To ensure Ethiopia becomes a competitive destination for medical and wellness tourism, we must prioritize healthcare quality and accreditation by implementing rigorous standards, continuous monitoring, and capacity-building initiatives. This begins with pursuing international accreditation such as JCI and ISO for key hospitals and clinics, coupled with a national accreditation framework tailored to medical tourism needs. Mandatory licensing and competency assessments will guarantee adherence to global best practices in patient safety and clinical outcomes. A robust regulatory system enforced by the Ethiopian Accreditation Service and Ministry of Health will mandate incident reporting, audits, and ethics compliance, while a national awards program will incentivize excellence.

To enhance customer care, all human resources will be trained in cross-cultural communication and patient-centered service, ensuring medical tourists receive personalized, empathetic treatment. Annual quality summits and benchmarking against regional competitors will foster continuous learning. Key outcomes include accrediting hospitals within 10 years, reducing patient safety incidents, and achieving top-tier satisfaction scores. By embedding quality into every level of service from clinical care to hospitality, Ethiopia will build trust, attract more patients, and position itself as Africa's premier medical tourism hub.

Customer care is a critical aspect of the success of medical tourism. Medical tourists travel to foreign countries for medical treatment and expect to receive high-quality healthcare services along with excellent customer service. Therefore, healthcare providers and facilities must prioritize customer care to meet the needs and expectations of medical tourists.





To provide excellent customer care for medical tourism, healthcare providers and facilities must focus on communication, responsiveness, and personalization. This involves offering clear and accurate information to medical tourists about their healthcare options, treatment plans, and costs. They must also be responsive to the needs and preferences of medical tourists, providing personalized care that addresses their specific health concerns and cultural expectations. Additionally, healthcare providers and facilities must ensure that medical tourists have access to high-quality amenities and services, including comfortable accommodation, transportation, and leisure activities. They should also assist with travel arrangements, visa processing, and other logistical issues that medical tourists may encounter.

Healthcare providers and facilities must prioritize patient safety and the quality of care, ensuring that medical tourists receive safe and effective medical treatment while also providing post-treatment follow-up care to ensure their recovery is on track. Providing excellent customer care for medical tourism requires a commitment to communication, responsiveness, personalization, and safety. By prioritizing these aspects of customer care, healthcare providers and facilities can enhance their reputation, attract more medical tourists, and contribute to the growth and success of the medical tourism industry.

Key components of customer care include post-procedure care, facilitating accommodation and other ancillary services, planning communications in target countries' languages, strategies for attracting target medical tourists, and addressing the spiritual aspects of care in wellness destinations.



# 8

## Availability and accessibility of Medical and Wellness services



## 8. Availability and accessibility of Medical and Wellness services

### 8.1. Availability and accessibility of medical tourism

"The services listed were selected based on a situational analysis document that considered: national abroad referral rates of patients from government facilities needing foreign currency for treatment abroad, disease burden in Sub-Saharan African countries, cost implications, and existing infrastructure. Information on international medical tourism referrals was gathered from medical tourism documents from countries such as India, Rwanda, and Sri Lanka.

Comprehensive data on the specific services requiring referral within East Africa is currently lacking. However, data from Rwanda indicates that "diagnostics, cardiology, oncology, and nephrology are the highest in-demand specialties in the region." To gather more information on neighboring countries, a survey conducted through Embassy Liaison offices or a team organized by the Ministry may be necessary.

To understand the reasons behind outbound medical tourism, Ethiopia requires a national survey. Considering specialty and subspecialty roadmaps, evidence from East African countries, and the implementation of a medical and wellness tourism roadmap, the technical working group has identified nine specialties and subspecialties, as well as specific diagnostic services, for proposed medical and wellness tourism. These service areas and diagnostics include..."

1. Cardiac services
2. Oncology services
3. Transplant services
4. Orthopedic services
5. Infertility services
6. Neurology services
7. Rehabilitation services
8. Critical care services
9. Diagnostic care services

"To ensure high-quality healthcare and achieve international accreditation, healthcare providers and facilities must prioritize patient safety and allocate the necessary resources. This includes:

- **State-of-the-Art Facilities:** Investing in modern infrastructure and equipment is crucial for providing high-quality care.
- **Resource Allocation:** Adequate staffing, including qualified medical professionals and support staff, is essential.
- **Quality Assurance:** Implementing robust quality assurance mechanisms, including regular monitoring and assessment, is critical for identifying areas for improvement and ensuring continuous quality enhancement.
- **Evidence-Based Practices:** Integrating evidence-based practices into clinical care is essential for achieving optimal patient outcomes.

By prioritizing these aspects, Ethiopia can build a solid foundation for a thriving MWT (Medical and Wellness Tourism) sector that attracts international patients and fosters trust in the country's healthcare system."

## 8.2. Availability and accessibility of wellness tourism

“Wellness Institutions (Standalone Centers, Hotels/Resorts, or Tourist Centers) must provide high-quality wellness services and observe health safety standards. Adherence to a standardized national implementation document, to be prepared under the leadership of the Ministry of Tourism in collaboration with the Ministry of Health and other stakeholders as deemed necessary, is required.

Ethiopia is well-positioned to attract travelers seeking both medical treatments and wellness experiences. This sector combines medical services with the principles of wellness, promoting a comprehensive approach to health that encompasses physical, mental, and emotional well-being.

### Key Features of Wellness Tourism in Ethiopia:

- 1. Diverse Healing Traditions:** Ethiopia has a long-standing history of traditional medicine, incorporating herbal remedies, spiritual healing practices, and holistic approaches. Travelers can experience indigenous practices alongside modern medical treatments, offering a comprehensive approach to health.
- 2. Natural Resources:** Ethiopia is home to several natural hot springs, mineral-rich waters, and therapeutic mud, particularly in regions like the Afar and the Tigray. These resources can be used to develop wellness spas and therapeutic treatments, attracting visitors seeking natural healing options.
- 3. Cultural Heritage:** Ethiopia's rich tapestry of cultures, languages, and traditions can enhance the wellness tourism experience. Unique cultural rituals, traditional music, and culinary practices centered on health and nutrition can provide enriching experiences for visitors.
- 4. Hospitality and Community-Based Tourism:** The Ethiopian culture is known for its warm hospitality and communal gatherings. This aspect of Ethiopian life can create a welcoming environment for tourists, enhancing their overall experience and making health and wellness tourism more appealing.





## Wellness Tourism Services in Ethiopia:

- 1. Thermal/Mineral Spas and Resorts:** Development of thermal resorts utilizing natural hot springs can cater to wellness tourists seeking relaxation and rehabilitation. Locations such as the hot springs in the Dallol area can be developed into wellness retreats.
- 2. Health and Wellness Retreats:** Establishing retreats that offer yoga, meditation, fitness programs, nutritional counseling, and traditional healing practices can attract tourists interested in rejuvenation and holistic health. Locations in the scenic highlands or near natural parks can provide serene backdrops for these activities.

By investing in these areas, providers, and facilities, in collaboration with the Ministry of Tourism, the Ministry of Health, and other stakeholders as deemed necessary, can elevate their standing, draw more customers, and bolster the growth and prosperity of the Medical and Wellness Tourism industry.”

## 8.3. Policy

“Policy decisions encompass all aspects that contribute to the realization and sustainability of MWT in Ethiopia. This section includes areas embedded in the service, such as consumables and instruments, and other factors closely related to the service processes.”

### Short term:

#### Supply Chain Management

“The bureaucratic processes involved in purchasing consumables and equipment needed for existing subspecialty services in the country have consistently been a primary obstacle to the provision and continuity of care. The sole kidney transplant program serves as a stark example. Widespread interruptions of surgical services for unacceptably long periods due to a lack of consumables, which can effectively be interpreted as discontinuation of the surgical services, have occurred. Even the follow-up care of transplanted patients faces continuous challenges due to the erratic availability of immunosuppression drugs, lab reagents, and the lack of pathology and microbiology services, as well as rejection treatment drugs. This bureaucracy stems from the processes outlined in the financial law of the MOFED and, more specifically, the procurement processes used by the EPSS. A revision or radical change to overcome this bottleneck is a prerequisite for successful MWT. Suggested options to overcome such bottlenecks include enabling the EPSS to manage the procurement of consumables and equipment needed for sub-specialty and super-specialty services, and innovative approaches such as autonomous procurement by facilities for specially allocated consumables and equipment according to the specific services they provide.

### Long Term Strategies:

- Pharmaceutical and Medical Equipment Production
- Local Capacity Enhancement
- Attracting Investors
- Law and Agreements (can also be included in the short-term plan)
- Agreements between Government, agencies, and insurance companies at national and international levels should be explored.”



# 9

## **Brand Ethiopia as a Medical and Wellness Tourism destination**



## 9. Brand Ethiopia as a Medical and Wellness Tourism destination

### 9.1. The needs of branding Ethiopia as medical destination

“A positive image and strong positioning can be achieved through effective branding. Branding Ethiopia as a premier medical destination can reinforce a positive image and help communicate the unique value proposition of the country.

Ethiopia possesses diverse branding resources and assets that are already promoted as part of its unique tourist destination, under the umbrella of “The Land of Origins,” signifying that “the destination delivers products found nowhere else.” Ethiopia is a land with a glorious history and culture. As “Africa’s home and oldest independent country,” it is home to more than 80 nations with distinct cultural traditions and values, speaking over 80 different languages. Ethiopia has been a member of UNESCO since 1955 and is a leading country in Africa. Ethiopia’s cultural industry is one of the oldest and most exceptionally diverse in the world. Communities possess diverse cultural values such as a hospitable approach to others, indigenous knowledge of arts, cures, and conflict resolution, as well as rich ceremonies, festivals, celebrations, rituals, and other living expressions. This is why UNESCO recognized Ethiopia as a premier cultural and historical destination in 2016. The dramatic landscape and varied weather in Ethiopia also offer assets for adventure activities that contribute to maintaining or enhancing personal well-being. Furthermore, the Ethiopian airline’s connectivity, safety record, and level of service quality are significant successes that support the development of medical and wellness tourism.

Despite Ethiopia’s unique strengths, individual public and private hospitals and other businesses currently market themselves independently in source markets. There is a lack of coordinated campaigns to promote the destination for medical and wellness services. Therefore, to grow Ethiopia as a destination for medical and wellness tourism, there is an urgent need to create awareness through a strong brand image that highlights the wellness potentials and offerings of the country for all visitors, as well as the specific medical tourism offerings for patients seeking such services.”

### 9.2. “Origin of healing” as Brand for promoting Ethiopia

“Ethiopia is the origin of humankind, *Coffea arabica*, and a unique cultural management system. Historically, it is also the origin of ancient traditional medicine and a well-known hospitable approach to treating others. Wellness potentials, such as traditional and nature-based therapies, Ethiopian gastronomy, its history, and early indigenous knowledge, can be a major draw, especially given the growing preference in the West for organic gastronomy. Ethiopia also boasts competent medical doctors and expertise in modern medical science, which can be a significant asset in developing medical tourism. The cost of quality medical procedures and services is low compared to competitors. World-class facilities oriented towards new special tourism zones, particularly those incorporating wellness offerings, will provide a competitive edge.

By leveraging these core values, Ethiopia can offer cutting-edge modern treatments combined with enhanced wellness treatment systems, providing holistic healing to people both domestically and from across the world. To highlight these strengths, Ethiopia will be marketed as a medical and wellness tourism destination under the call-to-action statement “Come to the Origin of Healing.”

Under the brand statement “Origin of Healing,” every promotional campaign and integrated communication strategy to promote the brand Ethiopia will be prepared and executed in partnership with the industry. This will be promoted as a sub-brand of ‘Land of Origins’ on all the digital platforms and global media campaigns of the Tourism Ministry.”

### 9.3. Strategy of promoting brand Medical and wellness tourism

#### Cooperation with Ethiopian Embassies

Ethiopian Missions can play a crucial role in establishing the “Come to the Origin of Healing” brand in their respective source markets. The Missions will be actively engaged to solicit their support in promoting Ethiopia as a medical and wellness destination. The Missions will be periodically briefed on policy and sectorial issues, as well as on the strengths of Ethiopia’s medical and wellness tourism offerings.

#### Diaspora Engagement as Ambassadors

Ethiopia has a considerable diaspora population in America, Europe, and African countries, particularly in East Africa, which can be a priority market in the initial years of this strategy. Given that Ethiopia has one of the largest diasporas, they should be targeted to visit the country for their medical and tourism needs. This can be achieved by developing partnerships with diaspora organizations such as community groups and cultural associations to promote MT (Medical Tourism) and raise awareness of the benefits of seeking medical treatment in Ethiopia. Providing information and resources to diaspora organizations will help them educate their members about MT, including both the benefits and risks, and how to choose reputable healthcare providers.

#### Scaling Up Cooperation with Key Sectors to Promote Brand Medical

Key public sectors, business companies, and associations can play a vital role in promoting Ethiopian brand medical and wellness tourism in conjunction with their activities. Therefore, awareness creation is essential, along with establishing a suitable platform for the performance of this collective mission.”

# 10

**Marketing and promotion**



## 10. Marketing and promotion

Health and wellness is a complex offering. Ethiopia is committed to providing quality and safe medical care and wellness services to our customers. The quality, safety, and overall customer experience of our services must be self-evident. Therefore, adequate effort and attention will be given to ensuring quality, safety, and a positive customer experience, so that we are accurately representing our services and not overstating their capabilities.

The core of all medical services provided will be based on four pillars:


1. Effective/Evidence-based
2. Safe
3. People-centered
4. Efficient medical care

The target customers for Ethiopian medical and wellness tourism will be Ethiopian nationals and individuals from neighboring countries, the region, and Africa. Addis Ababa, as a diplomatic hub in Africa, will also provide high-quality service to the international community.

The pricing of services should reflect the needs of various customer categories. We must learn from the experiences of other countries that have faced challenges related to patient exploitation by some hospitals and facilitators. Therefore, we will devise mechanisms for regulating service pricing and ensuring price transparency. We will also strengthen relationships with existing international insurance companies and establish connections with more insurance companies from the East African region and beyond to facilitate service access.

Promoting the medical and wellness services offered is crucial to reaching targeted customers. We will leverage existing embassies, attachés, and Ethiopian Airlines to promote medical and wellness tourism. Furthermore, we will utilize TV, print, and social media to promote services. We will also explore ways to capitalize on Addis Ababa's status as a diplomatic city and the seat of many continental and international organizations. Additionally, we will engage our diaspora community and utilize airports to promote medical and wellness tourism.

Ethiopia is strategically located in the heart of East Africa, close to all East African countries, and hosts the most significant air traffic in the region. In addition, there is road and rail connectivity to its neighboring countries. Ethiopia also boasts favorable weather, hospitable people, a rich culture, and is a land of diverse religions. Almost all languages of the region are spoken in Ethiopia, and the cultures and culinary traditions of neighboring countries are similar. Furthermore, there is a substantial health workforce with competitive labor costs in the region. All these factors position Ethiopia as a well-situated country in a strategic location to attract medical and wellness tourists from East African regions and beyond.



One of the critical factors in ensuring high-quality service is streamlining the processes customers navigate to receive the care they need. We will emphasize processes that directly impact the customer experience and strive to make the logistics seamless. We will ensure that there is adequate manpower to always cater to customer needs. We will also ensure that banking, exchange services, and government services are easily and readily available to customers within a reasonable timeframe.

As part of the marketing and promotion thematic area, this roadmap focuses on:

1. Defining target audience and creating a strategy
2. Leveraging Digital Marketing
3. Investing in content marketing
4. Promoting Ethiopian brand Medical and Wellness tourism with “Come Home to the Origin of Healing.”
5. Partnering with Industry Stakeholders
6. Providing Excellent Customer Service”

# 11

## Digitalization of Medical and Wellness Tourism



Digitalization enhances communication and engagement between Medical and Wellness Tourism (MWT) providers and customers, ensuring easy access to transparent information, facilitating informed decision-making, and promoting safe service delivery. Digital tools also support the rehabilitation process for medical tourism customers after they return home following medical intervention. Furthermore, digitalization aids in the efficient enforcement of laws and regulations.

The widespread use of technology in medical and wellness services necessitates digitalization to enhance functionality. Service providers and stakeholders will collaborate to design a platform offering a one-stop shop for all the needs of domestic and international patients traveling to Ethiopia for medical treatment. This platform will enable users to research options, plan trips, reserve services, make payments, and access post-medical care. Each stakeholder's services will be comprehensively represented on the portal.

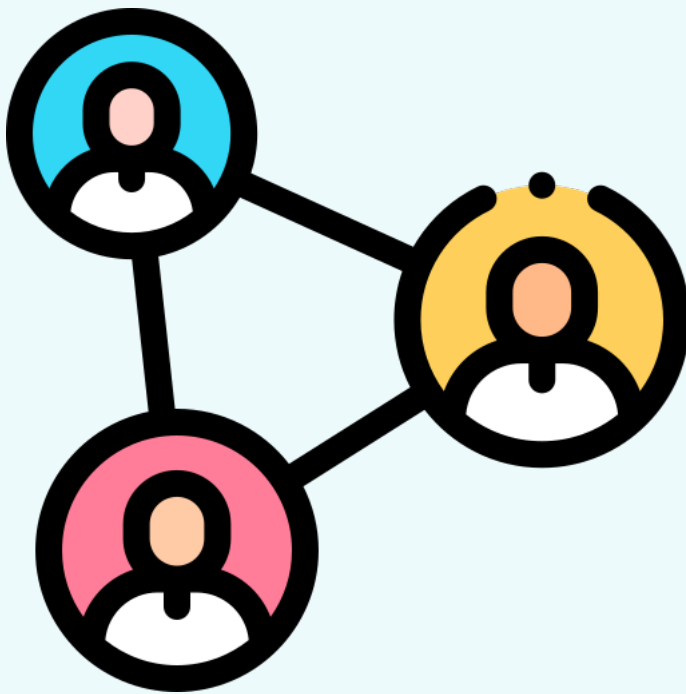
A digitalization tool can also advise customers on preparing for services and providing guidance on post-treatment care. Additionally, it can offer insights into the overall functioning of the MWT sector.

The major characteristics of such an online digital system vary but typically include the creation of login accounts for each industry participant, detailed information about services provided, streamlined marketing and branding campaigns, the upholding of strict standards, storage of market data, and a platform for client ratings.



# 12

## Governance and Institutional Framework



## 12. Governance and Institutional Framework

In May 2023, the Ethiopian Ministry of Health, in collaboration with the Tourism Ministry, private sector entities, associations, and other stakeholders, established a Technical Working Group (TWG) to develop a national medical tourism and wellness roadmap. The “Ethiopian Medical and Wellness Tourism Roadmap” will serve as a comprehensive guide for governmental, private, and non-governmental organizations, outlining priority investment areas and tourism products within a defined leadership framework.

Under the guidance of the MoH, the TWG will develop supporting documents and implementation modalities, providing technical assistance in preparing medical tourism and wellness implementation guidelines. The TWG is also responsible for ensuring the proper functioning of institutions and their acceptance by the public. Furthermore, the TWG will create a platform to unite stakeholders working in health service provision and tourism programs to identify existing resources for medical tourism and wellness services, and to enhance medical tourism market promotion for the wider global community.

The TWG will propose, coordinate, and monitor the establishment of the National Medical Tourism and Wellness Board (NMWTB), which will directly report to the Prime Minister and designated representatives. The board members will be drawn from the Prime Minister’s Office, the Ministry of Health, the Tourism Ministry, the Ministry of Foreign Affairs, the Ministry of Finance, the National Bank of Ethiopia, regional governments, the Investment Commission, the Immigration Nationality and Vital Events Agency, the Mayor’s Office, private sector entities, and Ethiopian Ambassadors in various countries.

The TWG will work diligently with the National Board to guide and oversee the overall implementation of medical tourism and wellness governance, complementing domestic and global medical tourism regulations. The National Medical Tourism and Wellness Board (NMWTB) will streamline the governance system in medical tourism, such as visa applications for medical travelers requiring treatment. The Board is responsible for approving and executing price guidelines to manage fees charged by healthcare providers, which can limit escalating medical costs to ensure relative affordability. Effective governance of medical tourism and wellness enhances the enrollment of medical students and attracts foreign-trained professionals to return to work in the country, subsidizing their medical education and keeping them up to date with new technologies and innovations within the healthcare system.”

### 12.1. National Medical and Wellness tourism Board

To foster a ‘patient-centric’ and ‘tourist-centric’ approach and to unite all stakeholders on a single platform for promoting medical value travel and wellness tourism, the Board will be positioned as a one-stop center for promotion, business development, facilitation, networking, regulation, and grievance redressal within the medical value travel sector in Ethiopia.

The Board will have the following functions:

- The Board will work towards establishing MVT as a distinct sector, providing a platform for consultation and exchange of ideas among all stakeholders. This will facilitate the development of suitable policy recommendations and strategies for promoting Ethiopia as a premier medical and wellness tourism destination.
- In consultation with the National Accreditation Board for Hospitals (NABH) and other stakeholders, the Board will establish suitable guidelines for registration, oversight, and grievance redressal for MVT facilitators and service providers. This will ensure the trust and confidence of medical travelers.

- All government benefits and incentives shall be granted only to those MVT facilitators and service providers who comply with these guidelines, and appropriate penalties may be levied for violations.
- The Board will encourage and facilitate institutional arrangements and affiliations between source country governments/institutions and healthcare service providers in Ethiopia, solidifying its position as a leading medical value travel destination.
- The Board will develop and promote “Heal in Ethiopia” as the brand for positioning Ethiopia as a medically valuable travel destination on the world tourism map.
- The Board will organize conferences, seminars, exhibitions, and other networking events, both in Ethiopia and abroad, to showcase Ethiopia as a medical value travel destination.
- The Board will develop and maintain an online medical value travel portal and database of hospitals, clinics, wellness centers, spas, medical tourism companies, hotels, and other relevant stakeholders within the medical value travel sector in Ethiopia.
- The Board will connect all stakeholders in a retail chain to develop complete packages for medical value travel, encompassing service providers, government entities, agents, hotels, airlines, transfer services, tourist attractions, and more.
- The Board will coordinate and facilitate any other requirements for the promotion of medical and wellness tourism within the country.

## **Board Structure**

The Board will be restructured to modernize its functioning and effectively discharge its responsibilities as a one-stop center for medical value travel. The Board will comprise advisory, technical, and executive committees to effectively carry out its functions.

## **Advisory Committee**

The Board will have an advisory committee comprising representatives from all relevant ministries, private sector entities, associations, airlines, hotels, regional states with significant medical value travel activity, and other stakeholders. The Advisory Committee will provide high-level guidance and support to the MoH on matters related to medical tourism and wellness to enhance implementation. The advisory group will also create a platform to unite stakeholders working in medical tourism to identify practically performed medical tourism and wellness initiatives, improving the registration system, program design, and implementation.

## **Technical Committee**

The Board will have a technical working group with relevant expertise in oversight, grievances, and quality-related matters. The members of the TWG will be selected by the medical service lead executive office based on their professional qualifications, experience in medical tourism and wellness program implementation, sector knowledge, and contributions to the provision of high-level policy documents. The Technical Working Group envisions collaboratively working with medical tourism and wellness stakeholders. The group anticipates developing a roadmap for medical tourism and wellness in Ethiopia. In addition, the group will be responsible for preparing the strategic plan and implementation guidelines for medical tourism and wellness. The National Technical Working Group for Medical Tourism and Wellness will report to the medical service LEO.

## Executive Committee

The executive committee will be a smaller group with close ties through leadership, enabling them to convene quickly, often with little notice, to address pressing issues affecting the organization, such as emerging crises. The Board will have an executive committee that will approve various initiatives and projects for implementation.

## 12.2. Partnership and coordination

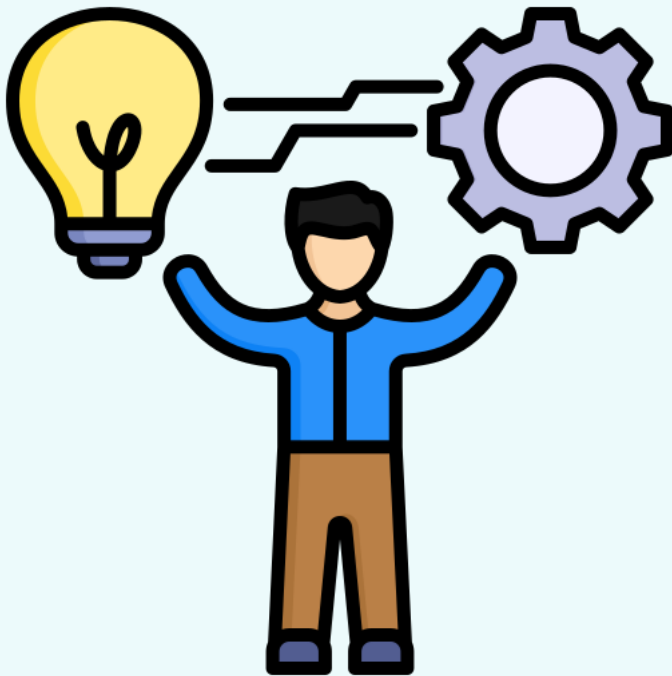
Partnerships and collaborations in medical tourism create synergies, enabling stakeholders to leverage their strengths. This leads to improved healthcare outcomes, expanded service offerings, and enhanced patient experience. These partnerships offer a range of benefits, including increased access to capital, risk mitigation, diversification, enhanced expertise, market access, shared responsibilities and resources, network expansion, and shared success.

Partnerships between hospitals, hotels, transportation services, and local tourism authorities can create comprehensive healthcare packages for medical tourists. These packages often include medical services, accommodation, transportation, and leisure activities, providing holistic experience for patients and their companions. One of the significant benefits of partnerships is the strengthening of practical cooperation between investors, leading to the establishment of larger entities such as hospital groups. These entities can leverage their combined resources and expertise to provide state-of-the-art medical services through collaborative efforts. Furthermore, fostering partnerships encourages domestic investment in developing medical and wellness centers in key national tourist destinations. This enhances the overall healthcare infrastructure and contributes to the growth of the tourism industry.

Another excellent opportunity for partnership lies in linking and integrating medical and wellness investments with the national public-private partnership modality to create synergistic opportunities. This collaboration between the public and private sectors enables the sharing of resources, knowledge, and responsibilities, resulting in improved service delivery and better healthcare outcomes. By embracing these collaborative approaches, the healthcare sector can unlock its full potential and drive positive changes in the medical and tourism domains. Partnerships between different organizations can also facilitate compliance with regulatory requirements and quality assurance standards. By working together, healthcare providers can ensure adherence to international guidelines and establish protocols to maintain patient safety and satisfaction.”

# 13

## Implementation Arrangement



## 13. Implementation Arrangement

The Ethiopian Medical and Wellness Tourism body will be established under the Ministry of Health (MoH). The MoH will form the National Medical & Wellness Tourism Board from relevant stakeholders. This Board will have the authority to lead and dedicate itself to developing an institutional framework and implementing it according to the roles and responsibilities outlined in this roadmap and its establishment terms of reference. This roadmap aims to address existing gaps in realizing the potential of medical tourism when consumers choose to travel across Ethiopian borders to receive medical treatment.

### 13.1. Implementation Approach

The Ethiopian Medical and Wellness Tourism body will be established under the (MoH). The MoH will form the National Medical & Wellness Tourism Board from relevant stakeholders. This Board will have the authority to lead and dedicate itself to developing an institutional framework and implementing it according to the roles and responsibilities outlined in this roadmap and its establishment terms of reference. This roadmap aims to address existing gaps in realizing the potential of medical tourism when consumers choose to travel across Ethiopian borders to receive medical treatment. The national medical and wellness tourism program will be implemented using a phased approach.



#### Phase One: Preparatory Phase (Years 1-3)

The objective of this first phase is to establish a robust governance framework and supportive policies that enable the growth and development of medical and wellness tourism in the country. This includes ensuring high standards of care, safety, and accessibility for international patients. Specifically, Phase One focuses on establishing a National Medical and Wellness Tourism Board, comprising different committees: an advisory committee, a technical committee, and an executive committee, each designed to fulfill specific functions. This phase will include capacity building, document preparation, and approvals.



## Phase Two: Intermediate Phase (Years 4-7)

The objective of the second phase is to enhance the operational framework and service quality of medical and wellness tourism by strengthening regulatory systems, fostering collaboration between the public and private sectors, improving workforce competencies, and leveraging technology. The aim is to create a sustainable and competitive environment that attracts both local and international patients. This phase will focus on facilitation-related programs such as medical tourism marketing, visa processes, land acquisition, medical and wellness tourism destination development, standardization, communication, curation, and resource allocation.



## Phase Three: Implementation Phase (Years 8-10)

The objective of the third phase is to solidify the sustainability and competitiveness of medical and wellness tourism by integrating comprehensive planning across sectors, improving service delivery and infrastructure, fostering continuous professional development, and leveraging technology for marketing and operational efficiency. This phase aims to create a cohesive ecosystem that supports high-quality medical services while ensuring a seamless experience for both local and international patients. The primary focus of this phase will be the full implementation of medical and wellness tourism initiatives.

**Table: Implementation plan**

Major focus areas	Interventions	Phase one			Phase Two				Phase Three			Responsible / Stakeholders
		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	
<b>Leadership, coordination, and governance system</b>	1. Establish national level governance structure both at MoH and MoT to facilitate and guide medical and wellness tourism											MoH MoT
	2. Establish a National Board for medical and wellness tourism											MoH MoT
	3. Mainstream the planning and integration of MWT activities across the Board member sectors											MoH, MoT, MoE MoI, EIC, MoFA MoIT, FLB, IES MoTL, ECC
	4. Strengthen the licensing and regulatory system for medical and wellness tourism.											MoH MoT MoTI
	5. Strengthen access to up-to-date and reliable data for MWT											MoH MoT



<b>Polices and regulation</b>	2.1 Define and redefine enabling policies and incentives to attract potential investors											EIC DBE FLB NBE
	2.2 Define and redefine policies and regulations to ensure the Availability of sufficient basic infrastructure, amenities, and facilities for medical and wellness tourists.											MoH, MoT, EEP MoTL ERA
	2.3 Define and redefine policies, regulations, and proclamations to ensure medical care and wellness services' safety, access, and quality.											MoH MoT ESA HoPR
	2.4 Formulate a policy to regulate abroad referral and medical tourist brokers											MoH MoT
<b>Improve investment in developing new international standard medical and wellness tourism facilities.</b>	3.1 Establish platforms that promote the realization of local and international joint ventures.											MoH, MoT, MoFA, EIC,
	3.2 Strengthen the national public-private partnership modality to improve medical and wellness tourism investment											MoH, MoT, MoF,
	3.3 Dedicate land for the development of healthcare cities and specialized medical centers											MoH, MoT, FLB,
	3.4 Organize forums, expos, workshops, and experience-sharing tours for investors and managers in the medical tourism industry area to promote investment in MT.											MoH, MoT, MoFA, EIC, ECC
	3.5 Facilitate financing of prioritized international standard medical tourism facilities development projects											MoH, MoT, MoF, EIC, ECC, NBE, DBE

<b>Quality and standard of service in medical and wellness tourism facilities</b>	4.1 Establish mechanisms to encourage and incentivize hospitals and medical centers to be enrolled in the international accreditation scheme											MoH, MoT,
	4.2 Improve the supply chain system to ensure an uninterrupted supply of state-of-the-art medical devices, instruments, drugs, and consumables.											MoH, EPSA, ERCA, NBE, MoTL,
	4.3 Strengthen the quality management system of the medical and wellness tourism facilities											MoH, MoT
	4.4 Establish a complaint-handling system for medical and wellness tourism services.											MoH, MoT
	4.5 Strengthen the national accreditation system for medical and wellness centers											MoH, MoT, ENAO, ESA
	4.6 Improve customer service, communicative skills, and language proficiency of professionals in health and wellness tourism (HRD&M)											MoH, MoT,
	4.7 Improve identified competency gap of the healthcare workforce and managers in the medical tourism (HRD&M)											MoH, MoT,
	4.8 Promote and support digitization and health information systems for medical and wellness tourism											
<b>Marketing and promotion</b>	5.1 Improve technology-based marketing and promotion techniques (social media and digital platform) for medical and wellness tourism											MoH, MoT, Telecommunication, MoIT, INSA
	5.2 Scale-up diversified advertising and promotion through Destination Brand											MoH, MoT, Medias , Telecommunication, MoIT, INSA
	5.3 Establish & strengthen Co-Marketing platforms.											MoH, MoT,
	5.4 Strengthen cooperation between wellness tourism and healthcare services.											MoH, MoT,
	5.5 Integrate medical information services with national tourist information center service.											MoH, MoT,

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