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Determinants of New Federal City of Indonesia (Nusantara) Impacting Medical Tourism in Malaysia

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Abstract: Medical tourism has experienced substantial growth in recent years, with Malaysia emerging as one of the premier destinations for Indonesian medical tourists, owing to its accessible and high-quality healthcare services. This medical tourism sector in Malaysia has evolved into an integral component of the broader tourism industry, significantly contributing to economic development, and enhancing the nation's global profile as a reputable healthcare destination. This study examines the factors influencing the selection of Malaysia as a preferred destination for medical services. It explicitly addresses geographical location, quality of healthcare services, medical expenses, and overall medical performance. Healthcare facilities in regions characterized by robust infrastructure, accessibility and superior service quality tend to attract more medical tourists. Additionally, providing high-caliber healthcare services attracts international patients and enhances the overall perception of the healthcare system within the host country. Medical care costs represent another significant factor in Malaysia's appeal to patients seeking treatment. The affordability of medical procedures plays a vital role in enticing medical tourists, as it directly influences their decisions to seek treatment abroad. Adherence to high standards of medical care attracts international patients and fosters trust and loyalty, which are essential for the sustainability of medical tourism. The intricate interrelationship among geographical location, service quality, medical costs, and healthcare performance is critical in attracting medical tourists. Each element enhances the destination's allure, influencing patients' decisions to pursue medical services internationally.

Keywords: *Location; quality service; cost; performance; medical tourism*

1. Introduction

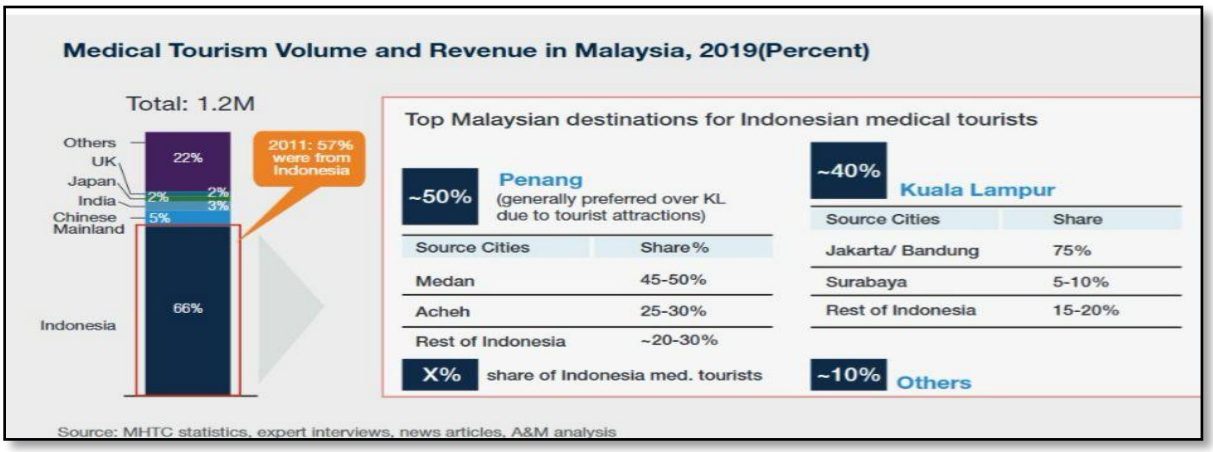
Indonesia's new capital, Nusantara, currently under construction on the island of Borneo, could significantly impact medical tourism in Malaysia. The location, which is closer to Malaysia's healthcare centers in East Malaysia and near major Indonesian islands like North Sumatra and North Kalimantan, could shift Indonesian consumer preferences and access to healthcare. As a result, Malaysia may become a more attractive destination for medical tourists from Indonesia. According to Saragih et al. (2019), Indonesia is already one of Malaysia's top healthcare consumers. The proximity of a destination is a key factor in choosing a medical tourism location. Historically, Malaysia has drawn Indonesian tourists with its affordable, high-quality healthcare and convenient travel options. As Abu Bakar noted in The Star, allowing visa-free entry makes it easier for patients to organize and manage their treatment. This policy reduces visa application costs, enabling health tourists to return for follow-up care, specialist consultations, and additional treatments.

Malaysia receives more than half of its medical tourists from Indonesia, with a strong focus on cardiology, oncology, and fertility treatments. The ongoing partnership between Malaysia and Indonesia in health and tourism suggests that this trend will likely continue, with Indonesia seeking medical treatment in Malaysia (Saragih et al., 2019). This is supported by their shared cultural heritage and Malaysia's active promotion of medical tourism within the ASEAN region. Over the past decade, Malaysia has become a top choice for Indonesians seeking healthcare, accounting for over 60 percent of the country's medical tourism (Business Today, 2023). However, as Indonesia improves its healthcare system in Nusantara, competition may increase, which could impact Malaysia's medical tourism industry in the long run.

Medical tourism has surged in recent years, with Malaysia becoming a leading destination for Indonesian medical tourists due to its affordable, high-quality healthcare services. Indonesians are seeking medical services in Malaysia because of the perceived benefits, as well as the actual advantages. This trend has significant implications for Indonesia's healthcare system and Malaysia's medical tourism industry. While Malaysian healthcare providers have built a reputation for being reliable and advanced, Indonesian healthcare

facilities struggle to retain patients due to limitations in infrastructure, specialist availability, and public trust. However, this phenomenon raises several issues and challenges that impact patients, the healthcare system, and bilateral relations.

Figure 1: Medical tourism revenue in Malaysia (2019)



Sources: MHTC Statistics (year published)

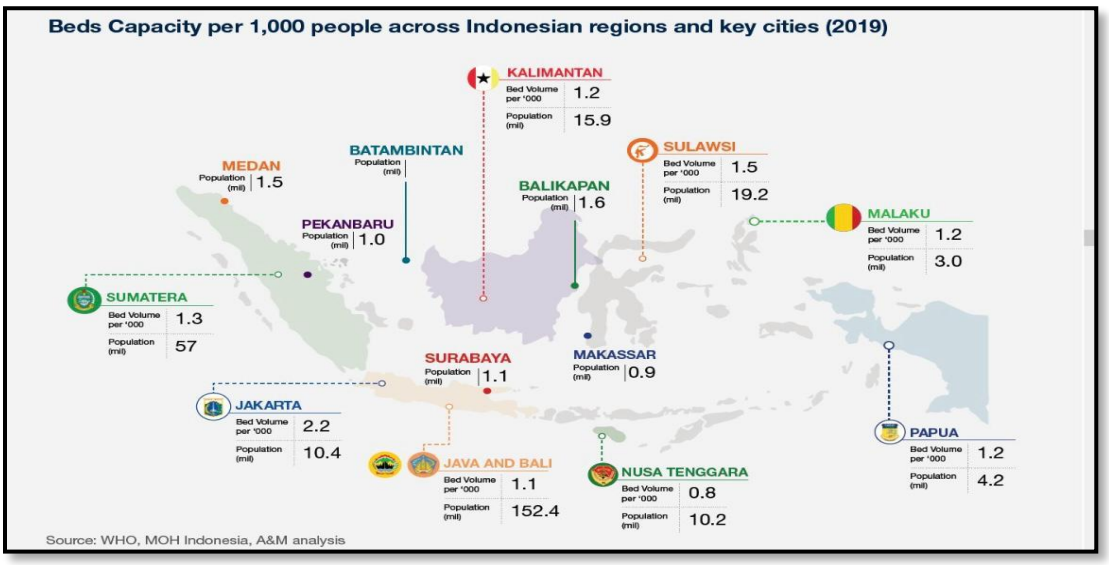
Several major issues are facing the Indonesian healthcare system, where providers face a double challenge: financial losses due to patients seeking care abroad and a widespread perception of lower-quality care at home. To improve service quality, address infrastructure gaps, and boost public trust, reform and investment are crucial (Health Ministry of Indonesia, 2020). In contrast, Malaysian patients tend to view their hospitals as providing higher-quality care, specialized services, and better access to advanced facilities. Many Indonesians, however, struggle to access certain procedures or treatments locally because of limited resources or a shortage of specialists.

Despite the Indonesian government's efforts to improve healthcare infrastructure, a lot more progress is needed to meet regional and global standards. Right now, Indonesia has 1.2 hospital beds per 1,000 people. Even with plans to add more hospitals and beds, the ratio is expected to only reach 1.7 by 2027, which is still below the World Health Organization's recommended 2.4 beds per 1,000 people. Additionally, Indonesia has one of the lowest rates of doctors per capita, with about 0.6 doctors per 1,000 people – roughly four times less than in Malaysia and significantly lower than the WHO's recommended levels.

Each year, a large number of Indonesians travel to Malaysia for medical treatment, thanks to the affordability, quality, and accessibility of healthcare services. In 2022, about 300,000 out of 1.5 million Indonesian visitors to Malaysia sought medical services, making up over 60% of Malaysia's medical tourists. Top destinations include Penang (with hospitals like Island Hospital, Gleneagles, and Loh Guan Lye), Kuala Lumpur (with hospitals like the National Heart Institute, Prince Court, and KPJ), and other states such as Melaka (with hospitals like Mahkota Medical Centre and Oriental Medical Centre). Popular treatments range from cardiology and oncology to orthopedics and ophthalmology.

Medical tourism has become a major player in Malaysia's tourism industry, boosting the country's economy and solidifying its reputation as a top healthcare destination worldwide. The sector now accounts for around 3.9% of Malaysia's Gross Domestic Product (GDP) (Omar et al., 2023). With over 900,000 international patients visiting Malaysia in recent years, demand for medical services has shown steady growth (Zahir et al., 2021). To attract medical tourists, Malaysia offers top-notch healthcare facilities, skilled professionals, and a range of treatments, including cosmetic surgery, dental care, and complex procedures like organ transplants (Seow et al., 2017). By incorporating Islamic values into healthcare practices, such as providing halal food and prayer facilities, Malaysia has become even more appealing to Muslim medical tourists (Alfarajat, 2022).

Figure 2: Bad capacity per 1,000 people across Indonesian regions and key cities (2019)



Although Malaysia reaps economic benefits from medical tourism, the trend reveals significant healthcare disparities between neighboring countries. To address these issues, it's crucial to understand why Indonesians choose Malaysia for healthcare, identify obstacles to improving healthcare in Indonesia, and mitigate the consequences of this trend. While Malaysia gains revenue from medical tourism, Indonesia misses out on potential economic gains as healthcare spending leaves the country. Moreover, Indonesians who need basic healthcare services may be forced to travel abroad, which has socio-economic implications. Additionally, Malaysia's cultural and linguistic environment is more familiar to Indonesians, making it a preferred destination for medical tourism compared to other countries offering similar services.

2. Literature Review

Medical Tourism

Medical tourism is the practice of traveling abroad for medical care, a trend that has seen a significant surge in recent years. This growth can be attributed to factors such as cost-effectiveness, access to advanced medical technologies, and the opportunity for patients to combine treatment with a vacation. The trend is particularly noticeable in countries with high healthcare costs, like the United States and Canada, where many people seek out more affordable options for procedures that can be extremely expensive at home (Crooks et al., 2010; Alsharif et al., 2010).

There are many reasons why people choose medical tourism. One major factor is the cost, as patients often find they can save a significant amount compared to what they'd pay for healthcare at home (Crooks et al., 2010; Johnston et al., 2010). For example, individuals from countries with public healthcare systems may wrongly assume they can get reimbursed for treatments abroad, which can influence their decision to seek medical care overseas (Crooks et al., 2010; Johnston et al., 2010). Furthermore, the high-quality medical services in countries like South Korea, India, and Iran—known for their strong medical tourism programs—play a key role in drawing international patients (Kim & Seo, 2020; Rokni & Park, 2020).

However, the growth of medical tourism raises important concerns about ethics and public health. There's a built-in conflict between the economic benefits medical tourism can bring to a country and the potential strain it may put on local healthcare systems (Xu et al., 2021; Snyder et al., 2013). Countries promoting medical tourism must make sure their public health services stay strong and fair, so local populations aren't left without necessary medical care because international patients are prioritized (Xu et al., 2021). Additionally, the quality of care and patient safety in foreign healthcare systems can vary greatly, making it essential to establish international standards to protect patients (Xu et al., 2021; Johnston et al., 2011).

It's crucial to prioritize patient experiences in medical tourism. Research reveals that while many patients report high satisfaction with their overseas healthcare experiences, concerns remain about post-operative care, ongoing treatment, and potential complications (Hwang et al., 2018; Majumdar, 2018). Medical tourism facilitators play a key role in guiding patients through the complexities of seeking care abroad, which is essential for informed decision-making and maintaining trust in the healthcare process (Snyder et al., 2013; Snyder et al., 2011).

Location

Where hospitals are located is key to boosting medical tourism, as it affects patient choices and how appealing a destination is. Generally, hospitals in areas with solid healthcare infrastructure, good access, and high-quality care attract more medical tourists. Research shows that well-established healthcare facilities with a broad range of services significantly enhance medical tourism by providing vital support for diagnosis and treatment (Latief, & Ulfa, 2024). This is particularly true in countries like Malaysia, where the strategic location of hospitals has been linked to the growth of the medical tourism industry (Turai, 2023).

Furthermore, the quality of information hospitals share, mostly through their websites, plays a crucial role in attracting medical tourists. Studies have found a strong link between having detailed and compelling information about hospital services on websites and the proportion of medical tourism in a region (Shaygani, 2023). This aligns with research emphasizing the importance of a solid online presence and effective communication strategies in engaging potential medical tourists (Sweidy, 2023). By compellingly presenting their services and facilities, hospitals can increase their appeal and improve their chances of attracting international patients.

Accreditation has a significant impact on medical tourism in a particular location. Hospitals with accreditation are typically seen as more trustworthy and equipped to provide top-notch care, which is essential for medical tourists (Yıldız & Khan, 2019). These accredited facilities enhance the reputation of healthcare destinations and give patients confidence in the quality of care they can expect, greatly influencing their choice of where to get medical treatment (Alshamsi, 2024).

Additionally, having hospitals located near major transportation hubs and tourist spots can make it easier for medical tourists to get around. Studies show that easy access plays a big role in medical tourists' decisions, affecting their overall satisfaction and convenience (Turai, 2023). By combining healthcare services with tourism infrastructure, areas can create a more appealing setting for potential patients, which could increase medical tourism in the region (Dag, 2024).

Healthcare quality services

High-quality healthcare services are key to growing medical tourism, as they significantly influence where patients choose to get treatment. When healthcare is top-notch, it draws international patients and boosts the reputation of the host country's healthcare system. Research indicates that the perceived quality of healthcare services has a direct impact on tourist decisions, with patients more likely to recommend destinations that offer excellent public healthcare services (Kapera, 2024). This connection underscores the importance of maintaining and improving healthcare standards to build a robust medical tourism sector.

For medical tourism providers to successfully market their services, they need a solid grasp of what quality service means. Studies show that providers should take into account how international patients perceive quality service when developing their marketing strategies. This means addressing patients' concerns about risk before, during, and after treatment, as these concerns can greatly influence their decision on where to get treatment (Guiry & Vega, 2015). By focusing on quality service, providers can boost patient satisfaction and build trust, a crucial factor in healthcare, especially for critical services like surgeries and specialized treatments.

Investing in healthcare infrastructure and advanced medical services is key to improving the quality of care in medical tourism. By upgrading healthcare facilities, countries can keep patients who might otherwise travel abroad for treatment, which helps preserve local financial resources (Johnston et al., 2010). Furthermore, providing top-notch healthcare services creates long-term, skilled job opportunities that are essential for a

strong healthcare system. This investment is particularly important in low- and middle-income countries (LMICs), where enhancing healthcare quality can increase medical tourism and improve health outcomes for the local population.

Accreditation of healthcare facilities is crucial in delivering high-quality service in medical tourism. It's a quality assurance process that boosts the credibility of healthcare providers, making them more appealing to international patients (Alshamsi, 2024). By introducing long-term training programs that meet accreditation standards, healthcare services can be further improved, keeping medical tourism a viable option for patients seeking care abroad.

Moreover, the link between service quality and patient outcomes is crucial. Studies show that factors such as safety, hygiene, and having skilled healthcare professionals are key to drawing medical tourists (Dag, 2024). These elements not only boost the patient experience but also increase the destination's overall reputation as a reliable place for medical care.

Medical cost

Medical costs have a major impact on whether patients choose to go abroad for treatment, as they significantly influence patients' decisions. Research has consistently shown that high healthcare costs at home often drive patients to consider medical tourism as a viable option. For instance, a study by Crooks et al. found that patients frequently seek more affordable options abroad due to high out-of-pocket expenses for medical procedures at home (Crooks et al., 2010). This trend is particularly noticeable in countries with extremely high healthcare costs, prompting patients to turn to medical tourism as a more budget-friendly solution (Johnston et al., 2010).

Furthermore, the perception of cost savings constitutes a critical factor in the decision-making process of medical tourists. Research indicates that numerous patients are attracted to destinations that provide considerable savings on medical procedures in comparison to their home countries. For example, a study concentrating on Arab medical tourists in Turkey demonstrated that cost savings, in conjunction with the quality and accessibility of healthcare services, were essential determinants in the selection of medical tourism destinations (Dag, 2024). Similarly, a study carried out in Bangladesh revealed that affordable treatment costs, along with the quality of care, profoundly influenced the decisions of patients seeking medical services in India (Zakaria et al. 2023).

Some countries have made medical tourism more appealing by offering competitive prices for medical services. India, Thailand, and Mexico, for example, have become leading players in the medical tourism industry by providing high-quality healthcare at much lower prices than developed countries (Mishra & Sharma, 2021). This price difference draws patients in and encourages them to explore treatments that might not be covered by their insurance, increasing demand for medical tourism (Runnels & Carrera, 2012). Insurance coverage plays a crucial role. Many patients find their insurance plans limit access to essential procedures at home, driving them to seek more affordable options abroad. This trend is particularly relevant in the US, where rising healthcare costs and inadequate insurance coverage lead many people to consider medical tourism as a viable solution (Shi & Gan, 2021). Furthermore, medical tourism can also promote competition within domestic markets, potentially leading to lower prices and greater transparency in healthcare costs (Johnston et al., 2010).

Medical performance

Medical services must be effective to boost medical tourism, as this directly impacts patient satisfaction, treatment outcomes, and a healthcare destination's overall reputation. Providing high-quality care not only draws international patients but also builds trust and loyalty, which are key to long-term medical tourism success. Research has examined the link between medical performance and medical tourism growth, revealing important findings. First, medical service quality is essential for attracting medical tourists. Studies show that patients increasingly seek destinations offering top-notch care, state-of-the-art medical technologies, and experienced healthcare professionals. According to Pocock and Phua, countries like Thailand and Malaysia have established medical tourism committees to promote their healthcare facilities, known for their high-quality services and competitive pricing (Pocock & Phua, 2011). By focusing on improving medical performance, these countries have become leading destinations for medical care tourism.

Accreditation is crucial for maintaining high medical performance standards. It acts as a quality assurance system that enhances the credibility of healthcare providers, making them more attractive to international patients. Hiring qualified staff and upgrading technological capabilities are common strategies for improving medical performance in countries like Iran and Turkey, which are key players in medical tourism (Najafinasab et al., 2020). Accreditation ensures patients receive the quality of care they expect and helps healthcare facilities align with international standards, increasing their appeal. Gathering and using patient feedback to improve services is vital for enhancing medical performance. Earlier research shows that understanding patient experiences and expectations can significantly improve service delivery and outcomes. According to Crooks et al., patient experiences have a profound impact on their decisions about medical tourism, and addressing their concerns can enhance the overall quality of care (Crooks et al., 2010). This feedback loop is essential for healthcare providers seeking to attract and retain medical tourism patients.

Medical performance has a substantial impact on tourism's economic growth. Research by Johnston et al. shows that the costs of post-operative care for patients who travel abroad for procedures can be considerable. However, medical tourism can also bring significant cost savings that outweigh these expenses (Johnston et al., 2010). To boost a destination's appeal to medical tourists, it's essential to maintain high medical standards, minimize complications, and ensure positive outcomes. Additionally, effective marketing of medical services is vital in shaping how medical performance is perceived. By highlighting the quality of care, success rates, and patient reviews through strong communication strategies, destinations can significantly influence the choices of potential medical tourists. A study by Shaygani on the importance of hospital websites in providing comprehensive information about services underscores the need for transparency and effective marketing to promote medical performance (Shaygani, 2023).

3. Malaysia as a Medical Tourism Destination

Malaysia has truly blossomed into a standout destination in medical tourism, attracting international patients with its exceptional healthcare services, great pricing, and a broad array of medical treatments. The country is home to cutting-edge medical facilities and talented healthcare professionals who offer everything from cosmetic surgery to dental care, as well as complex medical procedures, all at prices that are much more affordable than those found in Western countries (Turai, 2023). Moreover, Malaysia's thoughtful marketing strategies, which focus on promoting healthcare options that cater to Muslim travelers, enhance its appeal to a diverse range of medical tourists (Gopalan et al., 2021). With a steady increase in the number of international patients, Malaysia is firmly securing its place in the global medical tourism scene. Table 1 dives into several studies about medical tourism in Malaysia, showcasing how the country is growing as a premier destination in Southeast Asia. The table highlights Malaysia's strategic efforts, competitive advantages, and the challenges it encounters in the vibrant medical tourism sector.

Table 1: Summary of Literature Review on Medical Tourism in Malaysia

Authors	Research Areas	Research Study Abstract	Key Findings
Chandran, Puteh, Zianuddin, & Azmi (2018).	Key drivers of medical tourism in Malaysia.	Malaysia has emerged as one of the most preferred medical tourism destinations in Southeast Asia.	- Malaysia is a popular medical tourism destination in Southeast Asia. - Medical tourism is a rapidly growing industry in Malaysia, and Malaysia has become one of the top medical tourism destinations in Southeast Asia. - The paper examines the key drivers behind the growth of medical tourism in Malaysia, and how globalization has contributed to this development.
Cham, Lim, Sia, Cheah, & Ting (2021)	Medical Tourism Destination Image and its Relationship to Revisit: A Study of	Malaysia is an attractive medical tourism destination for Chinese tourists due to country-specific and social	- Country-specific factors (knowledge, safety, accessibility, price) and social factors (word-of-mouth, social media) predict the image of Malaysia as a medical tourism destination.

	Chinese Medical Tourists in Malaysia	factors that influence its destination image and revisit intention.	- The image of Malaysia as a medical tourism destination affects the perceived value and intention to revisit.
Sarwar (2013).	Medical Tourism in Malaysia Prospects and Challenges	Malaysia's medical tourism industry is driven by destination competitiveness and service quality.	- Destination competitiveness and service quality are important factors contributing to the development of medical tourism in Malaysia. - Malaysia should promote its medical success stories and services to attract more foreign medical tourists. - The study contributes to the theoretical development of medical tourism by identifying key factors that contribute to its growth in Malaysia.
Abd Manaf, Hussin, Jahn Kassim, Alavi, & Dahari (2015).	Country perspective on medical tourism for the Malaysian experience.	Malaysia is a promising medical tourism destination, with high patient satisfaction and intention for future treatment.	- Indonesian patients form the largest group of international patients in Malaysia's medical tourism industry. - The five key factors influencing medical tourism in Malaysia are hospital and staff, country factors, combining tourism and health services, cost savings and insurance, and unavailability of treatment, with hospital and staff being the most important factor for patients. - International patients have a high perception of value, overall satisfaction, and intention for future treatment, indicating that Malaysia is well-positioned in the growing medical tourism industry.
Nemie, & Kassim (2009).	Cross-border issues in the development of medical tourism in Malaysia from the perspective of legal challenges and opportunities.	Malaysia has become a key player in medical tourism, but the legal framework needs to be strengthened to address cross-border issues.	- There is currently no internationally accepted legal framework to regulate medical tourism and address cross-border legal issues. - The economic benefits of medical tourism must be supported by a solid legal and regulatory framework, strong ethical standards, and high-quality healthcare services. - It is important to assess the existing legal framework for medical tourism in Malaysia to identify gaps and opportunities for legal and regulatory reform.
Abd Manaf, Ghazali, & Marikar (2010)	Positioning Malaysia in medical tourism	Malaysia is positioning itself as a major player in the growing medical tourism industry in Asia.	- The medical tourism industry in Asia is expected to grow significantly, with Malaysia positioning itself as a major player in this industry. - Malaysia has already seen a significant number of medical tourists and revenue generated from the medical tourism industry. - The paper explores the development and growth of medical tourism in the global and Asian contexts, as well as the role of various key stakeholders in the development of the

			medical tourism industry in Malaysia.
Chee, (2007).	Medical Tourism in Malaysia in the Aspect of International Movement of Healthcare Consumers and the Commodification of Healthcare	Malaysia has developed medical tourism as a deliberate strategy to attract foreign patients, facilitated by the state's role in providing a conducive policy environment.	- The rise of medical tourism was crucial for the survival and growth of Malaysia's healthcare industry. - The medical tourism industry in Malaysia has seen consolidation through regional integration of hospital ownership, as well as expansion of the medical tourist market. - The Malaysian government has played a key role in facilitating the commodification of healthcare through various policy measures to support and promote the medical tourism industry.

Theory of Planned Behavior

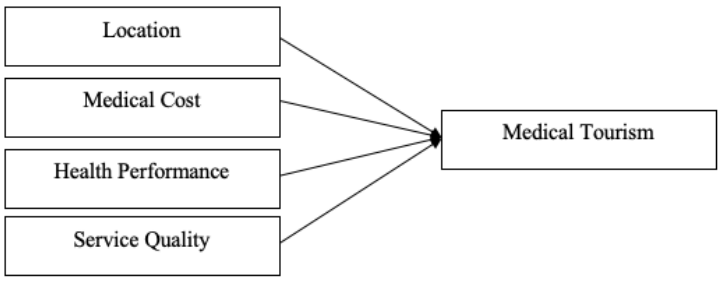
By applying the theory of planned behavior (TPB), we can examine more closely how location, service quality, cost, and performance intersect in the context of medical tourism. According to this theory, individual actions are driven by intentions that are influenced by attitudes, subjective norms, and perceived control over behavior. In the context of medical tourism, these factors help us understand why patients choose to receive medical treatment overseas.

Choosing the right location is so important in medical tourism because patients often seek out places that offer outstanding medical services at prices that won't break the bank. Research indicates that countries like Thailand, India, and South Korea have developed thriving medical tourism industries by enhancing their healthcare facilities and service standards, which in turn attract international patients. (Xu et al., 2021; Mishra & Sharma, 2021; Chang-Won, 2017). On another note, the quality of medical facilities and the expertise of healthcare professionals play a major role in shaping patient satisfaction and influencing their decisions (Chang-Won, 2017; Ghanbari et al., 2019). Many studies have revealed that patients frequently express high levels of satisfaction with their medical tourism experiences, which can foster a positive outlook towards future medical travel (Hohm & Snyder, 2015). The perceived quality of care, along with successful health outcomes, can have a substantial impact on patients' willingness to recommend medical tourism to others, thus influencing the social norms related to this choice (Ghosh & Мандал, 2018). Therefore, it becomes clear that factors such as location, service quality, medical expenses, and health outcomes are vital in determining customer acceptance.

Conceptual Framework

Figure 3 presents the conceptual framework for this study. It shows four main factors that contribute to medical tourism: location, medical cost, health quality, and service quality.

Figure 3: Conceptual Framework



4. Conclusion

Researchers have looked into what drives people to choose a hospital for medical tourism. According to existing research, the top hospitals for medical tourism are chosen based on location, service quality, medical costs, and healthcare performance. All these factors are crucial for success in the medical tourism industry. A combination of location, service quality, medical costs, and healthcare performance is key to attracting medical tourists. These elements greatly enhance a destination's appeal, influencing patients' decisions to seek treatment abroad. Location plays a major role in medical tourism, considering both geographical proximity and the availability of healthcare services alongside tourist amenities. Destinations that are easily accessible and offer a mix of medical treatments and leisure options tend to attract more medical tourists. Service quality is another vital aspect of medical tourism. Delivering high-quality healthcare is essential for patient satisfaction and building trust in medical providers. Studies show that perceived service quality has a significant impact on patients' choices of medical treatment destinations. Hospitals that prioritize service quality, including the professionalism of medical staff, access to advanced medical technology, and overall patient experience, are more likely to draw in and retain medical tourists.

Medical expenses play a huge role in the decisions of medical tourists. Many people seek treatment abroad because the costs of procedures in their home country are incredibly high. Research has shown that affordable medical services combined with top-notch care are a powerful draw for international patients. The quality of medical care is crucial for the success of medical tourism. High standards of care, successful treatment results, and efficient medical services are key to attracting patients. Studies have found that patients are more likely to choose destinations known for their exceptional medical care, including accreditation, qualified healthcare providers, and access to advanced medical technology.

In short, the combination of location, service quality, medical costs, and medical performance is vital for drawing medical tourists. Each of these elements makes a destination more attractive, influencing patients' decisions to seek healthcare abroad. By focusing on these interconnected factors, healthcare providers can boost their appeal to international patients, driving growth in the medical tourism industry.

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