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CLUSTER AS AN OPPORTUNITY FOR MEDICAL TOURISM IN POLAND[1]

Summary: The aim of this article is to present the state of the market of medical services offered to customers − patients from abroad and an indication of the opportunities arising from global trends prevailing in this area. The article presents the major determinants of the development of medical tourism, forecast sales in the medical tourism with a comparison of prices of selected medical services, criteria of selection to be set by the consumers, so as the spectrum of the most popular medical services among the medical tourists in Poland. Furthermore, it provides information on cluster policy and its objectives for the period 2014--2020, which may directly affect the development of medical tourism clusters and thereby contribute to the development of both the market of medical services provided to foreigners, as well as the economic development of the country.

Keywords: clusters, medical tourism.

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1. Introduction

The world has been experiencing an increasing interest in medical tourism for several years. Moreover, it is possible to identify countries, regions of the world that have built their potential through the provision of medical services for foreign patients. These countries include, among others, Brazil, Costa Rica, India, South Korea, Malaysia, Mexico, Singapore, Taiwan, Thailand and Turkey [*Patients beyond borders* 2014].

Poland still tries to catch up with this group of countries, the action for the promotion of Poland as a medical tourism destination has already been taken. Therefore, it is very important to create appropriate conditions for the promotion of this form of tourism in order to attract foreign patients − customers.

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Various big companies, possessing large promotion funds have already taken some actions in this field, trying to, more or less successfully, attract medical tourists. Smaller players used to face serious obstacles. Thus, it is crucial to consider the way Poland may seize the opportunity.

2. Definitional problems

There is an idea to create a cluster engaging a few, maybe a dozen actors offering medical services. Before the concept of a cluster is defined, it is worth explaining what medical tourism is.

Medical tourism is a form of travel outside a place of residence in order to improve health or aesthetics of the body, rehabilitation, renewal of psychophysical strength under the care of a specialist doctor's office, clinic or hospital, combined with a wide range of alternative offers of leisure activities within a given city or region. Such a journey should provide at least one night stay, and last no longer than 12 months [Rab-Przybyłowicz 2014, p. 27].

Medical tourism is therefore a form of general tourism, next to health tourism, spa and wellness. It is also a manifestation of broader national, international, and domestic tourism. Medical tourism in Poland may be associated with the image of the foreigner arriving to Poland for treatment. However, also the Poles travel in the country in search of specialists in the field of medicine. That is why medical tourism should not be considered so narrowly, even though the authors of the article mainly relate to incoming and outgoing tourism.

It should also be noted that some researchers [Lunt, Carrera 2010, p. 28] did not indicate any significant differences between health tourism and medical tourism. According to literature, medical tourism may be considered as:

- an integral component of the summer trip program (combined with the recereational tourism, VFR) [see also: Rab-Przybyłowicz 2010, pp. 695-696];
- a synonym for global healthcare; thus, medical tourism does not refer to care in case of health hazards during a patient's stay abroad, but to the main reason of departure − medical purposes [Crooks, Turner, Snyder, Johnston, Kingsbur 2011, pp. 726-732].

It should be pointed out, however, that medical tourism may take different forms depending on the motives of participants. These are as follows:

- recovering from illnesses and injuries,
- desire to offset the negative effects of stress,
- rejuvenating and preserving beauty (including cosmetic surgery),
- fight against addictions,
- decision to improve health through specialized treatment or operations under favorable non-hospital environment and conditions,
- fashion for the use of an increasingly diverse and unconventional offer of preventive healthcare,

- use of treatment not available at home or at better prices [Łęcka 2003, p. 175].

In conclusion, medical tourism is a rapidly growing sector of the global market, where patients travel to neighboring countries in order to receive medical treatment under the global trend of combining treatment with rest. More and more people are choosing trips that allow them to relax and at the same time undergo health treatment including beauty enhancement.

What is a cluster? Following the most common and comprehensive definition of a cluster by M.E. Porter, clusters are "geographic concentrations of interconnected companies, specialized suppliers, service providers, companies operating in related sectors and associated institutions (e.g. universities, standards bodies and trade associations) in particular fields, competing with each other but also cooperating. Clusters reaching critical mass, which requires a number of companies and other institutions forming the agglomeration effects, extraordinarily successful in certain fields of activity, are specific features of almost every national economy, regional, state, and even urban, mostly in developed countries" [Porter 2001, pp. 197-198].

3. Medical tourism market in Poland

Taking into consideration positive market changes, the potential consolidation of the companies may be questioned. This seems to be a prerequisite, as part of those entities is not able to compete for customers.

Modern tourism uses the acceleration, which is part of the process of globalization. As shown by reports, the medical tourism market in Poland should grow from year to year up to 2018 (Tab. 1).

Table 1. Forecast sales in the area of medical tourism in Poland in the years 2013-2018

	2013	2014	2015	2016	2017	2018
medical tourism (value in million PLN)	1 125,4	1 224,7	1 337,5	1 444,7	1 548,5	1 650,8

Source: [http://www.euromonitor… 2014].

Poland will soon become an important center for the global medical tourism, perhaps a leader in Central Europe (now it ranks third in the region, just behind Hungary and the Czech Republic). Nevertheless Poland is found as a larger and more diverse country than its competitors, having much better prospects. An example is the popularity of Polish implantologists in America. What is more, since 2009 Polish dentists have been allowed to train in implant treatment at New York University.

Foreigners visit Poland not only for dental treatment or plastic surgery, but also to look for offers within such areas as: orthopedics, eye surgery, cardiac surgery, aesthetic medicine and rehabilitation [http://www.tourmedica... 2014].

Poland has already become a target of medical tourism. In the first half of 2013, foreign patients spent 30 million PLN, and since the beginning of 2011 more than 150 million PLN.

At the core of the development of medical tourism are such factors as:

- the aging population of developed countries, as well as an increase in expectations as to the length – and above all – quality of life, to be utilized by tourist companies,
- overloaded health systems of many developed European Union (EU) member states,
- changes in lifestyle, and, above all, a fascination with health, caring for the physical condition and interest in alternative methods of maintaining good health and treatment.

Tourist market provides more and more interesting places for vacation, while at the same time offering a wide range of medical services at affordable prices. Poland in this area is expected to follow the trends, sustaining price attractiveness when compared to Germany and the United Kingdom, while, however, being exposed to the competitive pressure from the Czech Republic, Slovakia, and Hungary. Some treatment supplied by the Central European competitors are comparatively cheaper (Tab. 2).

Table 2. Price comparison of selected medical services (minimal prices in PLN)

Medical service	Poland	Czech Republic	Slovakia	Germany
cataract surgery	4 000	2 200	2 200	4 000
hip endoprosthesis	20 000	4 200	5 000	23 000
removal of tonsils	1 250	1 000	1 600	5 600
cardiological advice	120	80	250	250
ophthalmologic advice	150	35	200	200

Source: [medi-tour, 2014].

Medical tourism therefore plays a significant and growing role in the development of the Polish national strategy of tourism. Ministry of Economic Affairs has allocated 4 million PLN to promote medical tourism in Poland in the years 2012-2015, the first government program co-financed by the EU, the aim of which is to convince foreign medical tourists to use medical services that are available in Poland.

The main target of medical tourists are attractive cities with airports, very well connected, namely Cracow, Warsaw, Wrocław and Szczecin. The major advantages that attract foreign patients are as follows: quality of service in modern clinics, well-trained staff with highly developed language skills, as well as low cost of treatment. It should be noticed that the price is not a determining factor, but the quality and availability of service.

In the coming years we do expect a significant increase in medical tourism market in Poland. This situation is a result of significant commercialization and privatization of the healthcare market in Poland. In addition, medical tourism has been included in the "Strategy of development of tourism in Poland in 2007-2013", and is therefore a priority area in the further expansion of the tourism market as a whole. In addition, medical tourists tend to find Poland attractive because of:

- short duration of treatment/surgery,
- attractive range of services,
- attractive prices (prices of medical services in the countries of Central and Eastern Europe are often up to 60-80% lower than, for example, in the United Kingdom or in the United States),
- quality and standard of service,
- use of modern medical equipment and new technologies,
- qualified medical personnel (specialists in various fields of medicine, with very good knowledge of foreign languages).

The most popular medical services among medical tourists in Poland include:

- plastic surgery, aesthetics,
- orthopedics and traumatology,
- dentistry,
- orthodontics,
- weight loss,
- treatment of infertility,
- eyes diseases,
- addiction treatment,
- filling − botox, hyaluronic acid.

However, there is a question as to the way of taking advantage of the development of the Polish medical tourism market, and to build the country's image as an attractive tourist destination in the area of medicine.

Large companies (medical corporations) have already prepared the Polish market and have provided the offer in this area. However, there are a lot of operators of medium size on the market, with high quality hardware infrastructure, wide range of medical services, but without any experience in the promotion of their services outside the geographical area of their business. How can these companies be internationalized?

4. Clusters and cluster policy in Poland

The aim of cluster policy implemented in the new financial perspective (2014-2020) in the context of regional policy will have an impact on strengthening and transforming the competitive potential of groups of companies in the dynamic clusters with a high level of competitiveness and cooperation. These activities will be based particularly on:

- research and development activities,
- support of the international expansion of businesses within medical market,

- development of human capital in enterprises,
- stimulation of cooperation in trade,
- creation of new businesses.

Recommendations developed by the working group on cluster policy of the Polish Agency for Enterprise Development, published in the document entitled *Kierunki i założenia polityki klastrowej w Polsce do 2020 roku* (Directions and assumptions of the cluster policy in Poland till 2020) assume that the main objective of the cluster policy is to strengthen the competitiveness and innovativeness of the Polish economy by enhancing cooperation between industry and academia. The development of such cooperation should be enhanced by acitivities of both local and regional authorities.

This cooperation would involve the transfer of knowledge, know-how with the use of clusters, taking into account the concept of smart specialization. The implementation of this measure is based on two directions:

- The first path involves co-financing (mainly at the regional level) of the cluster coordinators (of both existing and emerging clusters), including their cluster initiatives. This provides opportunities of establishing institutions playing a key role in the development of cooperation, interaction and knowledge flows within the clusters of economic activity, and thus enhances their competitiveness and innovation.
- The second path is based on the integration of public support, available at both central and regional level, around the selected clusters of critical importance and competitive potential for the economy of the country and its regions, complying with the strategic economic specializations of both national and regional dimensions. These projects would be implemented by entities operating within the cluster, both the companies themselves, but not only, also educational and scientific institutions, business environment, sometimes consortia and other actors. The scope of activities of this path could include R&D, investments in shared educational or research infrastructure, human capital development, internationalization, etc. As a result, the utilization of various instruments of innovation, as well as scientific, technological, trade, human capital development policies etc. should be integrated and coordinated [Dzierżanowski 2012, p. 12].

Cluster membership may be beneficial for medial market companies because of:

- profit − active participation in the cluster translates into increased innovation, and thus the competitiveness of a company,
- credibility − access to both domestic and foreign inquiries, thus attracting more customers,
- ability to undertake joint marketing, promotion activities, inaccessible to individual operators,
- access to knowledge, exchange of information between the "actors" that facilitates the initiation and implementation of business projects,
- better interactions between business and academia,

- adjusting teaching to the needs of the labor market,
- branding benefits − effectively functioning cluster provides excellent advertising of the region in which it is located.

Taking into account the above mentioned information it becomes a reasonable idea to combine joint efforts of various players of the medical market within medical tourism initiatives into one system which in this case may be a cluster.

Such a cluster will bring together stakeholders from the medical market offering complementary medical services under the common brand and will contribute to the promotion of co-creating it businesses. The offer of cluster is to be addressed mainly to foreigners interested in treatment in Poland. Because of the shared and accumulated financial resources, such a cluster may be much more effective and expansive in terms of promotion acitivites.

5. Conclusions

Medical tourism is not a new phenomenon, however, in the recent years it has gained and is still gaining importance, becoming an important sector of the economy of various countries. On the global map of medical services Poland can also be noticed, manifesting serious ambitions and potential. At present, promotion activities of enterprises seem to be limited, unsufficient and uncoordinated.

Therefore, it is important to create a strong entity that would coordinate the operations of affiliated entities within a cluster, as well as promote them to attract foreigners to take part in medical treatment. Furthermore, more and more attractive offers of medical services, an increase in the quality and adaptation to the requirements of customers of the cluster, should contribute to the sales increase and turnover of the medical market entities, and thus, with the development of medical tourism should also increase the income of entities operating on the tourism market (namely, hotels, restaurants, museums, all the institutions associated with tourist services). Therefore, when taking into consideration recent trends, opportunities provided by the dynamic medical services market should be seized.

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KLASTER SZANSĄ DLA TURYSTYKI MEDYCZNEJ W POLSCE

Streszczenie: Celem artykułu jest zaprezentowanie stanu rynku usług medycznych oferowanych klientom – pacjentom z zagranicy oraz wskazanie, w jaki sposób można wykorzystać szanse wynikające z trendów globalnych panujących w tym obszarze. W artykule zaprezentowano główne czynniki determinujące rozwój turystyki medycznej, prognozę sprzedaży w obszarze turystyki medycznej wraz z porównaniem cen wybranych usług medycznych, kryteriami, jakimi kierują się konsumenci oraz usługi medyczne, z jakich korzystają najczęściej turyści medyczni w Polsce. Ponadto artykuł zawiera informacje dotyczące polityki klastrowej i jej założeń w latach 2014-2020, które mogą wpływać bezpośrednio na rozwój klastrów turystyki medycznej, a tym samym przyczyniać się zarówno do rozwoju rynku usług medycznych świadczonych na rzecz obcokrajowców, jak i do rozwoju gospodarczego kraju.

Słowa kluczowe: klastry, turystyka medyczna.