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**TOURISM
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**UNIVERSITY OF KRAGUJEVAC
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AND TOURISM IN VRNJAČKA BANJA**



THE MAIN CONDITIONS FOR MEDICAL TOURISM DEVELOPMENT - THE STATE OF ISRAEL

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Abstract

The subject of the paper refers to the fast growing field of health care tourism called medical tourism. The term medical tourism is usually defined as the system of improved medical procedures, treatments and services which attract foreigners to travel abroad and use/consume them. The aim of this paper is to emphasize the main conditions for medical tourism development, using the method of case study and method of qualitative analysis, based on the secondary research data, describing the development of medical tourism in the State of Israel.

Keywords: *Medical Tourism, the State of Israel, Innovation, Research and Development*

Introduction

The economy of the State of Israel is generally based on the innovation and high-tech industry, which represent the main sectors of the export of Israeli economy. Therefore, the economy of the State of Israel is worldwide known by its economic growth- changing the structure of her economy towards the more sophisticated sectors. Apart from that, by spreading the innovation and new technology to the other economic sectors (called „traditional industries“) on the national level, the overall Israeli economy improves in terms of its productivity (GDP), balance of payments, employment level, the level of employees' education and their marginal productivity.

The extension of the innovation and new technologies have also been given special attention to the field of medicine, influencing the establishment of so called Life Science companies. At the end of 1990s there were 200 Life Science companies in the State of Israel, whereas in the year 2014, their number grew up to 1,100. Each year 45 new Life

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Science companies have been established, all of them becoming profitable in the relatively short period of time. Consequently, the innovation in the sphere of medical devices represent the key export economic sector of the Israeli economy, contributing by 17.5% in total export. In the year 2014., the value of medical devices export was \$8.5 billion, which is the increase of 4% compared with the value of medical devices export realized in the year 2013 (Petrović, 2015, p. 24).

This approach has resulted in production and successful implementation of improved medical devices and delivery of high-quality medical treatments in the State of Israel. The strengthening of technological capacity in the field of medicine has led to the development and growth of one special kind of health care tourism called medical tourism. So, the first condition for developing the medical tourism sector includes the macroeconomic ambiance which fosters research and development, innovation, high-tech solutions and continuous education of medical staff.

As far as the institutional framework for medical tourism is concerned, The Israeli Ministry of Health is responsible for the promotion of the innovation, knowledge and expertise base in order to develop and make the concept of medical tourism in Israel competitive, by initiating, coordinating, regulating and monitoring the activities of private and public health institutions, as the main subjects in the sector of medical tourism. Strategic decision of marketing the State of Israel as a top destination for medical tourism has resulted in a fast growing number of foreigners coming in Israel for various medical treatments. Consequently, the medical tourism has growing demand in Israel, which significantly contributes to the growth of tourism sector as well as the whole national economy. Medical tourism creates jobs and income, saves lives and gives Israel a chance to promote its national message (Hasbara).²

Therefore, apart from the investment in research and development, the second condition for developing the medical tourism sector refers to the proper institutional framework- organization and strategic approach of the state in order to achieve the long-term goals of positioning the country on the medical tourism market, either at the regional, or global level.

² Hasbara is a specific word in Hebrew language, and can't be accurately and precisely translated into English, but the closest meaning would be sending good messages about Israel through many activities which positively influence the image and public opinion of the State of Israel in the world.

Medical tourism market - main characteristics

Although there are several terms used to express the travelling for medical purposes („Medical Travel“, „Health Travel“, „Health tourism“), the term „Medical Tourism“ is one that is commonly used by the international tourists (Jagyasi, 2010, p.7).

Although the sector of medical care tourism has still been considered as an emerging and relatively new part of the health care tourism (especially from the medical tourists point of view), it has already been proved that medical tourism has had significant potential for growth. Its contribution to the improvement of the tourism sector and the economy as a whole has also been reported by the countries which have developed this particular sector of health-care tourism. Precisely, the medical tourism contributes to the government revenues, direct foreign exchange earnings, employment rate, generating direct or indirect employment to the residential (Jagyasi, 2014).

The medical care tourism has captured the attention of several countries, resulting in the efforts of its development, continuous improvement and world-wide promotion. Therefore, even at the early stage of medical tourism development, the high competition at the global level has already been present. Some of the countries that already positioned themselves as a top medical tourism destinations include: Israel, United States, Costa Rica, India, Malaysia, Mexico, Singapore, South Korea, Taiwan, Thailand and Turkey (Woodman, 2014, p. 5). The first common thing for all these medical tourism destinations is the strategic decision of the state authorities to invest in research and development, innovation, the development of new technology and its implementation in the medicine sector. In other words, there is a significant positive correlation between the level of investment into the R&D and the development of medical tourism market.

The second characteristic of the medical tourism market, which explains the existing high competition in the medical tourism sector, refers to the already established and worldly accepted crucial factors and precisely defined high standards for its implementation, such as: JCI accreditation, Quality and Safety Transparency, Patient Safety, Transparency in Managing Risks, Importance of Market Transparency in International Medical Tourism (Todd, 2012, p. 70-72). Since the medical tourism deals with the peoples' health and human life in general, these and other

elements represent not only the necessary foundation of medical tourism, which are expected to be even more demanding in the future, but also the main factors of competitive advantage. Therefore, the high standards and high quality of necessary factors defined for the medical tourism influence the constantrise of global competition on the international medical tourism market. So, although the market structure can be, from the theoretical side, defined as monopolistic competition, in the practice, however, there are considerable entry barriers- sophisticated technology, high investment rate in research and development, institutional strategic focus and organization, and the already existed competition. Having all mentioned in mind, the second common thing for all current medical tourism destinations is the strategic decision of the state authorities to make encouraging institutional framework for the development of the medical tourism.

To sum up, the main conditions for the medical tourism development are tightly connected to the overall macroeconomic policy of the country - specially fiscal policy-primarily expressed through the level of investment in research and development (percentage of GDP spend on R&D). Second condition refers to the development of the encouraging institutional framework as a support for all market entities involved in the medical tourism.

Research and development, innovation and high technology as the foundation of the medical tourism development in the State of Israel

Most of the basic factors for Israeli medical tourism power can be found in the sphere of research and development, high technology and a constant innovations, which results in the state-of-art medical devices and continuous education of medical staff. Therefore, the professionalism of doctors, unique treatment methods, and high-quality health institutions with modern medical equipment are some of the factors attracting thousands of patients from abroad. Medical procedures in various fields of public and private medicine in Israel have a high percentage of success, higher than the average world figures such as IVF, bone marrow transplants, oncology treatments, heart surgery and after surgery rehabilitation such as physiotherapy and others (MedMar HealthCare).

The emergence of Israeli research institutes and pharmaceutical and biotechnological companies with their pioneering discoveries, enhanced by local companies (small-sized but human capital reached start-up

companies) that have invented state-of-the-art equipment and technologies, gives the Israel the solid base to compete on the global market of medical tourism. Moreover, Israel is also a pioneer in the development and implementation of laser surgical instruments, computerized monitoring systems, and other lifesaving and pain-relieving devices. Due to the sponsored medical research and development and pre-certification trials, some of the outstanding medical developments in Israel have been made. Just a few of them include: a procedure for the relief of prostate cancer and a highly popular treatment for the removal of kidney stones, based on a non-invasive system which crushes the kidney stones so that they can be removed naturally by the human body, and which usually doesn't require hospitalization (Israel: Medical Tourism Manual, Israel Travel News Ltd, 8).

Cutting-edge research is another area where Israeli professionals have excelled. Stem cell research is one case in point. There are many stem cell projects in the State of Israel, in various stages of development: ALS clinical studies; MS clinical research; research with bone marrow stem cells in treating Parkinson's Disease, and the development of a system by means of which stem cells could be grown in large tanks and cultivated in quantities big enough to meet the world's needs (Israel: Medical Tourism Manual, Israel Travel News Ltd, 9).

The state of Israel is well known for the innovative design and production of medical equipment and devices as well as the advanced know-how. Some of them, such as computer-assisted tomography (CAT) scanners, and advanced microcomputer-supported devices have also been exported widely.

Israeli hospitals are equipped with state-of-the art equipment and technology wherever developed, such as the SBRT technology, the most advanced form of Image-Guided Stereotactic Body Radiation Therapy in the world, which provides precision radiotherapy 10 times stronger than other radiotherapy machines, giving sufferers from many types of cancer a greatly increased chance of remission and recovery. Additionally, there is the da Vinci Robotic Surgical System, a major advance in general and cardio surgery alike, which is capable of performing long-distance surgery and providing an unprecedented level of accuracy. The functionality of the da Vinci exceeded beyond all expectations and has been a proven success with prostate cancer surgery (Hadassah Medical Center).

The high technology offers one more chance for Israel achieving the competitive advantage in the medical tourism, especially including the capacity for delivering the high-quality services for foreign medical tourists. High-quality of services which follow the process of medical tourism in Israel are given the special attention to. Namely, apart from multilingual medical staff³, each specialized medical center, including cardiology, IVF, oncology, orthopedics, genetic, gastroenterology, pathology, plastic surgery, dental surgery, gynecology and urology centers have state-of-the-art equipment allowing medical tourists to choose the dates of their surgeries and their surgeons, as well as the consultancy with their family physicians (in the country they live) before and after the procedures by telephone, video-conferencing or on the Internet. Therefore, the quality concept of medical tourism in Israel has been consisted of two equally treated parts: the professional quality of the medical procedures, as well as the quality and efficiency of additional services connected to the overall satisfaction of the clients (Petrović, 2015, p. 123) during their staying at the Israeli hospitals.

The full attention is paid to the safety and recovery of the medical tourists. Apart from hospitals, there are also many other entities with the role to ensure the quality of health care. In order to be able to offer specialized and high-quality pre- and post- procedures treatments, The Israel Center for Medical Simulation (MSR), as a world leader in simulation-based medical education, strives to improve patient safety and the clinical skills of healthcare providers through new approaches to healthcare training and practice. By proactively exposing trainees to challenging clinical and humanistic encounters, The Israel Center for Medical Simulation aims to reduce errors and improve the quality of care and teamwork (MSR- Israel center for Medical Simulation).

Additionally, there are a number of voluntary, altruistic not for-profit organizations loan out post-hospitalization equipment free of charge. There is even a local company specializing in developing and modifying special help devices when no commercial solution can be found.

3 The immigration from Russia at the end of 1990's made Israel also unique by removing the language barrier between the patients and the medical personnel. Many of the medical staff in Israeli clinics and hospitals speaks Russian as their mother language (most of the medical tourist come from Russia) and almost all staff speaks English. Besides that, French, German and Spanish are commonly spoken languages in the Israeli hospitals.

Institutional framework in the function of medical tourism development in the State of Israel

The crucial condition for the development and management of medical tourism sector include the strategic decision of the State of Israel to support it by proper health policy development (legislation), organization (public authorities in charge of medical tourism, and their coordination), standardization (national system of medical procedures/ services quality), controlling, evaluation and monitoring (data base, accurate statistics).

The Israeli Ministry of Health is the main public authority in charge of medical tourism in the State of Israel. The Israeli Ministry of Health is responsible for the control and management of health policies in the country, including the standardization and implementation of health regulations among the various hospitals and health centers in the country. The evaluation and monitoring are integral parts of the medical tourism in Israel since they give the opportunity for collecting, analyzing and tracking the necessary statistics, which in turn enable the Israeli Ministry of Health to follow-up the real situation, trends, contribution of medical tourism to the growth of tourism sector. From the other side, neat statistics offer the opportunity for the strategic planning and improvements of medical tourism in the State of Israel. Additionally, the Ministry of Health also regulates the qualification and certification of Israel's doctors and other medical professionals.

Having in mind the importance of the health care policy, the Israel National Institute for Health Policy Research was selected by the Health Council to facilitate and encourage research, surveys and professional expert opinion intended to supervise the implementation of the National Health Insurance Law. On June 15, 1994 the Israeli parliament (Knesset) passed the National Health Insurance Law-NHIL (National Health Insurance Law, 1994, Book of Laws, Official Gazette, No. 1469, p. 156), after decades of attempts and efforts to legislate or devise national health insurance (Cohen, 2012, p. 6). National Health Insurance Law came into effect on January 1, 1995. Medical services are provided through four health insurance companies, known as sick funds: KupatHolimClalit, KupatHolim Maccabi, KupatHolimMeuhedet and KupatHolimLeumit. KupatHolimClalit (General Sick Fund), the largest organization and the first health insurance institution, was founded in 1911 by a small group of agricultural workers and taken over by the Histadrut (General Federation of Labor) in 1920 (The Health Care System in Israel: An Historical

Perspective). This institution is in charge of evaluating the influence of health care policy on the health care system in Israel.⁴ The Israel National Institute for Health Policy Research regularly holds scientific meetings, policy debates and conferences intended to arouse discussions between researchers and policy makers. Its research findings have been translated into policy decisions and action plans (The Israel National Institute for Health Policy Research). Additionally, the Israel National Institute for Health Policy Research is in charge of the quality assessment of the services provided by HMOs (health and medical organizations), according to the national quality measures, being regularly published in the National Quality Measures Program Report (The Israel National Institute for Health Policy Research, 2012). In general, as far as the quality of health-care services are concerned, the Israeli system is marked as efficient even by the independent external researchers (OECD Economic Surveys: Israel, 2013, p. 78).

Israeli institutional framework fosters close cooperation and coordination between two main public authorities in the health-care system- The Israeli Ministry of Health and The Israel National Institute for Health Policy Research - when it comes to the policy of health care system, and its improvements.

In order to promote intensive intellectual interactions among scholars and practitioners from Israel and other countries regarding all aspects of health policy, with particular attention to Israel, the Israel National Institute for Health Policy Research launched and started with regular publishing of the new, open and publicly accessible the Israel Journal of Health Policy Research (IJHPR). The ultimate aim of the interactions among scientists and practitioners is to contribute to the development of health policy in Israel, and also to foster wider communication between health scientists and policy analysts in Israel and their colleagues around the world. So, the primary focus is the promotion of the interdisciplinary synergy between studies of different aspects of Israeli health care where the results of studies done by scholars in a number of health-relevant fields would be gathered in the same publication and contribute to the

4 According to the data from 2014, out of 51 countries, Israel's Health System is ranked seventh in the world, having: high score of efficiency (65.4), high life expectancy (81.7 years), health-care cost as percentage of GDP (7%), health care cost per capita (\$2,289). Source: Bloomberg, Most efficient health care 2014: countries <http://www.bloomberg.com/visual-data/best-and-worst/most-efficient-health-care-2014-countries>

continuous improvement of the Israeli health care policy (Rosen & Israeli, 2012).

Moreover, the institutional framework is also enriched by special law firms with the experience as well as technical expertise in the field of medical tourism, particularly dealing with themalpractice cases, whether it refers to the misdiagnosis, failure to render the correct treatment, or unreasonable delay before treatment is rendered. So, the patient's rights are highly protected and guaranteed by the Protection of Patients' Rights Law (Protection of Patients' Rights Law, 1996, Book of Laws, Official Gazette, No. 327), as well as by Basic Law: Human Dignity and Freedom (Basic Law: Human Dignity and Freedom, 1992, Book of Laws, Official Gazette, No. 1391).

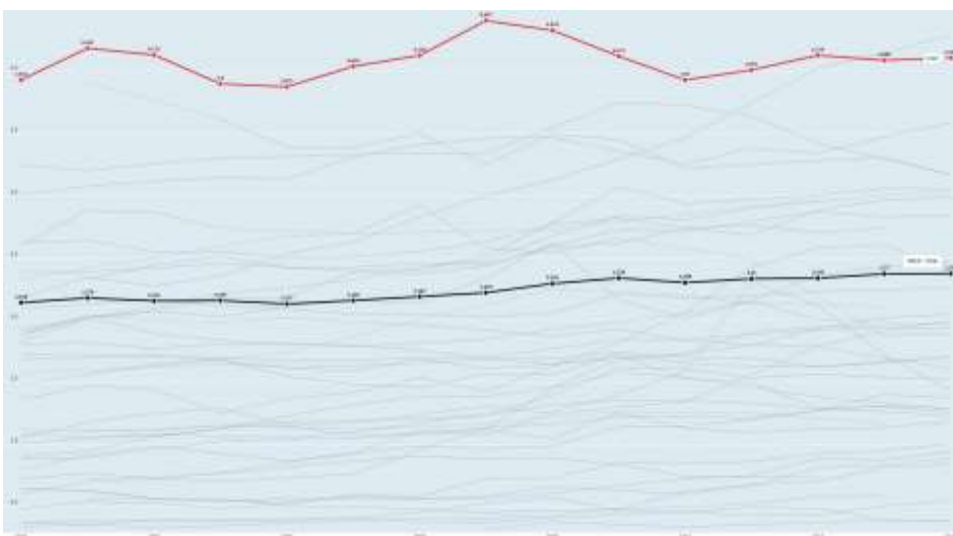
The last but not the least, forming the data base of all subjects (hospitals) in different areas throughout the country ⁵ (Health-Tourism.com, Medical tourism made simple) involved in medical tourism also represents the necessary element of the medical tourism promotion in the State of Israel. Data base is very important because it helps potential medical tourists to find out the whole list of hospitals accredited by the Israeli Ministry of Health and inform themselves about their specialization, prices and all needed information concerning the whole procedure and their staying at hospitals in Israel.

Main statistical data of the medical tourism in the State of Israel

According to OECD report from 2014, Israel is placed among the highest in the world for Research & Development expenditure, ahead of many OECD countries, and thus ahead of the total OECD countries expenditures on R&D. In 2014, total expenditure on R&D in Israel was 4% of GDP whereas the OECD, in the same year, totaled 2% of GDP (OECD Data, Gross Domestic Spending on R&D).

⁵ Top hospitals for Medical Tourism in Israel are: Tel Aviv Assuta Hospital - Tel Aviv, Herzliya Medical Center - Herzliya (5 KM from Tel-Aviv), Hadassah Ein Kerem Hospital and Hadassah Mount Scopus Hospital in Jerusalem, Sheba Medical Center - Tel Hashomer (Tel-Aviv suburb).

Graph 1: *Gross domestic spending on R&D (Total, % of GDP, 2000-2014)*



Source: *OECD Data, Gross Domestic Spending on R&D, <https://data.oecd.org/rd/gross-domestic-spending-on-r-d.htm> (*red line - Israel; dark line - OECD Total)*

This is the main reason for Israeli medical centers to be equipped with unique equipment and the newest treatment methods and medication.

Since Israeli government succeeded in placing the State of Israel on the global map of medical tourism top destinations, a number of foreigners coming to Israel has been continuously growing, making the medical tourism a profitable source of income for the nation's healthcare system.

According to the report released in April 2013 from the Israeli Ministry of Health, it is estimated that medical-tourism revenues skyrocketed from 54 million in 2009 NIS (New Israeli Shekel) to 119 million NIS in the year 2011. Some 30,000 medical tourists annually spend nearly \$5,000 per visit, compared to about \$1,500 for sightseers. In the year 2006, 15,000 people came to Israel for medical treatment, bringing in \$40 million in revenue. In 2010, Israel treated 30,000 medical tourists. It was estimated that in 2012 the income from medical tourism was at about \$140 million, whereas in the year of 2013 public hospital revenue was NIS 291 million, and private hospitals and health maintenance organizations revenues in

the same year were more than NIS 500 million⁶ (Medical Tourism Magazine, 2014, p.18-19).

The Health Ministry estimates that they inject about NIS 200 million a year into the health system, of which more than NIS 100 million goes to government hospitals. Outside experts put the total much higher, at almost NIS 500 million. In fact according to a report in 2013, the number of people from Eastern Europe and the United States seeking treatment at Israel's public and private hospitals has been growing (The Israeli Ministry of Health).

In 2013, approximately 30,000 foreign nationals entered the country specifically for various medical treatments. Approximately 50% of these visitors were medical tourists from Eastern Europe (mostly citizens of Russia and Ukraine), Western Europe, Cyprus and the United States. 65% of medical visitors that came to Israel have undergone various medical treatments, while the remaining 35% pursued cosmetic and aesthetic surgeries and treatments (Health-Tourism.com, Medical tourism made simple).

Most of these patients came for medical procedures that otherwise would be expensive or not readily available in their home countries, then because of the increased waiting list in their countries, as well as because of the Israeli technology and modern equipment that are compatible with the new health services (Horowitz & Rosensweig, 2007). Heart surgeries, oncology, cancer treatments and bone marrow transplants are common procedures that medical tourists come to Israel for treatment. Others come for the country's reputation in specific branches of medicine, such as in the field of IVF treatment, where Israel is considered a global leader.⁷ A survey published by the Journal Human Reproduction Update in 2002 showed that 1,657 in vitro fertilization procedures per million people per year were performed in Israel, compared with 899 in Iceland, the country with the second highest rate, and 126 in the United States, which trailed far behind European countries (Collins, 2002, p. 267).

6 Each Israeli hospital experiences boost in revenue, to mention just a few: Tourism revenue at Rambam Medical Centre in Haifa rose from \$2 million to \$5.5 million from 2009-2011. At Ichilov Hospital in Tel Aviv increases totaled \$10.5 million in 2009 and \$24 million in 2011.

7 The Israeli Hospital „Assuta Hospital“ in Tel Aviv performs about 7,000 up to even 16,000 of the fertilization procedures each year, which accounts for more than a quarter of Israel's approximately 28,000 IVF procedures a year.

Table 1: Cost comparisons between medical procedures in Israel and equivalent medical procedures in the USA and UK

Fertility Treatments			
Procedure	USA	Israel	Average Savings
IVF Treatments	\$16,000 - \$20,000	\$5,000 - \$6,000	68% - 70%
Medical Procedures			
Procedure	USA	Israel	Average Savings
Heart Bypass	\$120,000 - \$130,000	\$20,000 - \$35,000	73% - 83%
Hip Replacement	\$41,000 - \$43,000	\$35,000 - \$40,000	6% - 14%
Bone Marrow Transplant	\$240,000 - \$260,000	\$100,000 - \$120,000	53% - 58%
Knee Replacement	\$38,000 - \$40,000	\$20,000 - \$30,000	25% - 47%
Eye Surgeries			
Procedure	USA	Israel	Average Savings
Cataract Surgery	\$5,000 - \$6,000	\$3,500 - \$4,000	30% - 33%
Plastic Surgery			
Procedure	USA	Israel	Average Savings
Face Lift (rhytidectomy)	\$7,500 - \$9,500	\$6,500 - \$7,500	13% - 21%
Breast Augmentation (Mammoplasty)	\$5,000 - \$8,000	\$3,500 - \$4,000	30% - 50%
Complete Liposuction (lipoplasty)	\$4,000 - \$6,500	\$2,000 - \$3,000	50% - 53%
Nose Surgery (Rhinoplasty)	\$5,500 - \$6,500	\$4,000 - \$5,000	23% - 27%
Botox (Facial Region)	\$500 - \$1000	\$350 - \$450	30% - 55%
General and Cosmetic Dentistry			
Procedure	USA	Israel	Average Savings
Dental Implants	\$3,000 - \$4,000	\$1,000 - \$1,500	62% - 67%
Medical Procedures			
Procedure	UK	Israel	Average Savings
Bone Marrow Transplant	£140,000- £150,000	£60,000 -£70,000	53% - 57%
Plastic and Reconstructive Surgery			
Procedure	UK	Israel	Average Savings
Face Lift (rhytidectomy)	£6,500 - £7,500	£4,000 - £4,500	38% - 40%
Breast Augmentation (Mammoplasty)	£3000 - £5000	£2,000 - £2,500	33% - 50%
Breast Reduction	£3000 - £5000	£2,000 - £2,500	33% - 50%
Botox (Facial Region)	£340 - £400	£250 - £350	10% - 40%
General and Cosmetic Dentistry			
Procedure	UK	Israel	Average Savings
Dental Implants	£1800 - £2500	£600 - £1000	60% - 67%

Source: *Health-Tourism.com, Medical tourism made simple, <https://www.health-tourism.com/medical-tourism-israel/>*

As far as the prices of different types of surgery are concerned, it can be said that the State of Israel has a competitive advantage over the USA, since “the value for money” ratio is more than satisfactory. Although the statistics can be expressed only in approximate figures due to the different types and aspects of surgery in every field, there is still an indication that the level of pricing in Israel medical tourism gives the opportunity to the foreigners treated in Israel to save substantial amount of money (Table 1.)

According to the data in the Table 1. it can be said that, apart from the high tech medical devices and improved medical treatments in the State of Israel, the clients also receive good „value for money“, compared with other high developed countries.

Conclusion

The underlying foundation for medical tourism development in Israel includes highly developed and one of the world’s leading healthcare system, defined and continuously improved by research and development, innovation and high technology as well as the encouraging institutional framework and government support. The State of Israel is well-known for her constant and high investments in research and development, ensuring the Israel the role of global leader in the high-tech industry. High technology influences the development of modern medical devices and the improvement of medical treatments, that have propelled the practice of medicine in Israel to heights achieved in other highly developed countries. The encouraging institutional framework fosters a culture of ambition and a competitive and dynamic environment, which have created a powerful drive towards excellence that pervades every area of Israeli medicine. Therefore, the investment in research and development and proper institutional framework contribute significantly to the development of advanced medical tourism services in Israel, on a par with developed nations, yet at a much lower cost than the United States and Western Europe. High quality medical treatments as well as the good ratio of „value for money“ represent, not only the conditions for the development of medical tourism, but also the key factors of international competitive advantage of Israeli medical tourism.

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