

Happy holidays...

More tourists are mixing conventional sightseeing with a trip to the dentist.



Under the Knife...

It's not the mountain air, the sea breeze, or historical artifacts in Poland that foreign tourists are craving for: more often it is a new set of teeth, a facelift or a breast job that visitors are after. On the back of medical tourism a new industry is emerging.

In 2006, as many as 450,000 foreign tourists visited Poland to use domestic medical talents and skills. They spent an estimated \$65m in private clinics, spas and on inter-mediating agents. In 2007, the market is forecast to grow in revenue by one third, and to triple by 2013. The huge growth potential of the medical tourism sector comes as no surprise when compared to the rest of the tourism industry, of which it comprises only 1-2%. Yet, experts believe that with good promotion Poland's medical tourism could reap great rewards.

"The offers of Polish clinics and Spas posted on our website are read by several thousands internet users from 50 countries," says Dariusz Berdys, the founder of medical tourism portals med-tour.eu, bestclinic.info, and medicaltourism.pl, that are matchmaking the supply of medical services in Poland with the demand for it abroad.

According to Berdys, most of the clients come from the UK, Germany, and Scandinavia, countries where dental surgery, breast jobs, facelifts and lipo-suction, are 50% and even in some cases 80% more expensive than in Poland.

Other more complex surgery such as

laser surgery, which require regular hospital treatment, are becoming more and more popular, Berdys says. And it is the private sector that is successfully tapping into that segment. According to the National Healthcare Fund (NFZ), the number of beds in private clinics that offer those types of surgeries grew by 16% in 2006, whereas public-owned clinics reduced that number by 5%.

But wrong pricing might explain the fall. While a public clinic charges PLN 12,000 for a heart by-pass operation, a private clinic charges nearly double that. But such operation in the UK costs approximately PLN 70,000.

Apart from being able to offer competitive pricing, the market in Poland benefits EU regulations, and insurance companies in Western Europe are more and more inclined to cover the cost of surgery performed in Poland. German patients can have part of the cost of their dental and orthopaedic operations re-funded at home. The National Health Service in the UK sends patients abroad including to Poland and other Central European countries to cut waiting lists. Whereas it takes six months of waiting for a varicose

vein operation in the UK, it is almost instantly available at a private clinic in Poland.

The commercial potential of the market is being recognised by a growing number of entrepreneurs who have found a niche for themselves as matchmakers. The largest numbers of agents are registered in Szczecin, Gdańsk, Wrocław and Opole, all cities with a significant German footfall. Patients who go there for treatment are taken care of by agents right from the moment they arrive at the airport. They take them to the hotel, the clinic, and after the operation often take the patient on shopping trips or sightseeing. Industry insiders say, often patients who have had plastic surgery go shopping with the dressing still covering their faces. But according to the Polish Tourism Institute, the average medical tourist spends in Poland \$386 a day, a significant difference when compared to the \$236 spent a day but a regular tourist.

"Last year we had over 500 patients from abroad," says Anna Lewińska, press spokeswoman for IQ Medica, a private clinic that recently evolved from a medical tourism agency. "For a time we were only brokering deals between patients and clinics. But then we decided to open up our own Centre of Plastic Surgery, which caters mainly to foreign patients," she adds.

"We have the same quality of equipment in Poland as they have in the West," says Małgorzata Chomicka-Janda, an IQ Medica's plastic surgeon who performs ten operations a week for foreign patients. "Our doctors and nurses are well-trained and the quality of medical care is often better than in other countries." Chomicka-Janda adds that one of the selling points of Polish clinics is the high availability of professional personnel, including surgeons.

Drawbacks...

Yet, the pricing gap between Poland and Western Europe has its downside. More and more specialists think of relocating outside Poland. According to the trade supervisory body the Superior Doctor's Chamber (NIL), the bulk of doctors who consider working abroad are specialists. In this group 15% are plastic surgeons, who have already obtained NIL certificates that entitle them to work abroad. All that despite the fact that the problem of unemployment among medical specialists is non-existent in Poland, which means that soon, the supply side of the chain may dry up. "We urgently need to train new genera-

tions of plastic surgeons," says Chomicka-Janda. She adds that the numbers of plastic surgeries in Poland is rising sharply.

Along with the price gap and service availability factor, there is yet another aspect that can have a significant contribution to the development of the medical tourism market in Poland. According to the Health Consumer Powerhouse (HCP), a European provider of consumer information on healthcare, the market of healthcare services can stimulate the flagging economy of the European Union. The only thing to do for the EU legislators, HCP argues, is to give patients a wider choice of healthcare service providers, which, in turn, requires that the sector is privatised to a large extent.

This notion is in synchronisation when it comes to public medical sector managers in Poland. Facing escalating problems in financing clinics they are in charge of, local governments talk about turning public clinics and hospitals into companies that operate under the commercial code. Only with such a status, they argue, will local government-owned clinics be able to charge for the services they render.

A commercial edge to the sector has been promoted by the Medical University in Łódź, which recently opened up a commercial medicine department, the European Centre for Medical Tourism. The centre's mission is to educate and train medical tourism professionals, including tourist guides and medical tourism coordinators.

The case of Dental Travel Poland (DTP) a company that was one of the first in Poland to broker dental services for foreigners echoes the overtones of the lack of professional promotion and marketing. The fact that in 20 months after it was established DTP has generated over 1,000 queries from around the world came to a large extent by accident, say DTP founders Bartek Prokopowicz and Marek Hołowko. When they struck a deal with a dental clinic to represent, the problem of marketing came to the fore. Eventually they resolved it delivering promotional materials around London neighbourhoods. Yet, it was only after they slipped a handout to home of a journalist, who then covered their activi-

ties in Daily Express, that their business started to bloom.

Yet, the dynamic growth in the medical tourism sector may come to an early end. The British Association of Aesthetic Plastic Surgeons (BAAPS) announced in mid November the results of a survey on aesthetic procedures performed on "holiday surgery" packages. The survey revealed BAAPS deepest concerns over the significant growth in problems with cosmetic procedures performed via cheap offers abroad. The organisation highlights that 33% of surgeons have seen "much more" repair work over the last five years than previously, but 50% have

barriers and lower standards of quality in some countries. But most importantly, 92% of surgeons said they are most concerned with the lack of aftercare provided. Cheap offers of cosmetic surgery abroad has been a growing concern at BAAPS, which have in the past warned the public about the risks involved.

"My experience with patients has shown that counselling is inadequate," says Douglas McGeorge, BAAPS president and a consultant plastic surgeon. "The individuals have no idea of the standards of care in the country they are visiting and no knowledge of the abilities or experience of the surgeon. Follow-up is difficult.

Complications do occur and are usually left to the British system to treat."

BAAPS surgeons were also asked which countries some of these patients had chosen for their surgery. Over half (53%) of surgeons saw dissatisfied patients from Poland, followed by 44% of surgeons seeing patients from South Africa and 36% of surgeons who have seen problem cases from Belgium. Other countries mentioned in the survey included Hungary, Turkey, Croatia, Cyprus, Egypt and Thailand.

"This survey has shown how important it is for patients to thoroughly research every aspect of the procedure they are considering," says Nigel Mercer, BAAPS president-elect and consultant plastic surgeon. "Patients should be careful not to base choices on discounts, price and other marketing tactics, they need to make the best choice for their individual needs." ■ Regina Kozyra

How much they pay...

Poland appears cheap when it comes to cosmetic surgery.

Surgery type	Poland in euro	Germany in euro	The UK in euro
breast increase	2,250	5,200	6,250
breast decrease	1,750	4,900	7,450
lipo-suction	1,000	3,000	4,850
Full face lifting	2,500	6,800	8,000
Nose bone correction	1,300	3,500	5,000
Tooth implant	900	2,500	3,600
Porcelain tooth set	155	600	700

had to perform at least "a little more" repair work than before. Also, 14% of surgeons have seen nine or more patients in the last year alone with problems resulting from cheap cosmetic surgery abroad, and 44% of those polled have seen at least three to five cases. The top-three concerns surgeons have with surgery abroad are, according to BAAPS: aftercare, language