



Estonia's Strategic Choices for Developing the Health care Service Export

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4 principle strategic possibilities for the state to promote the health care services export

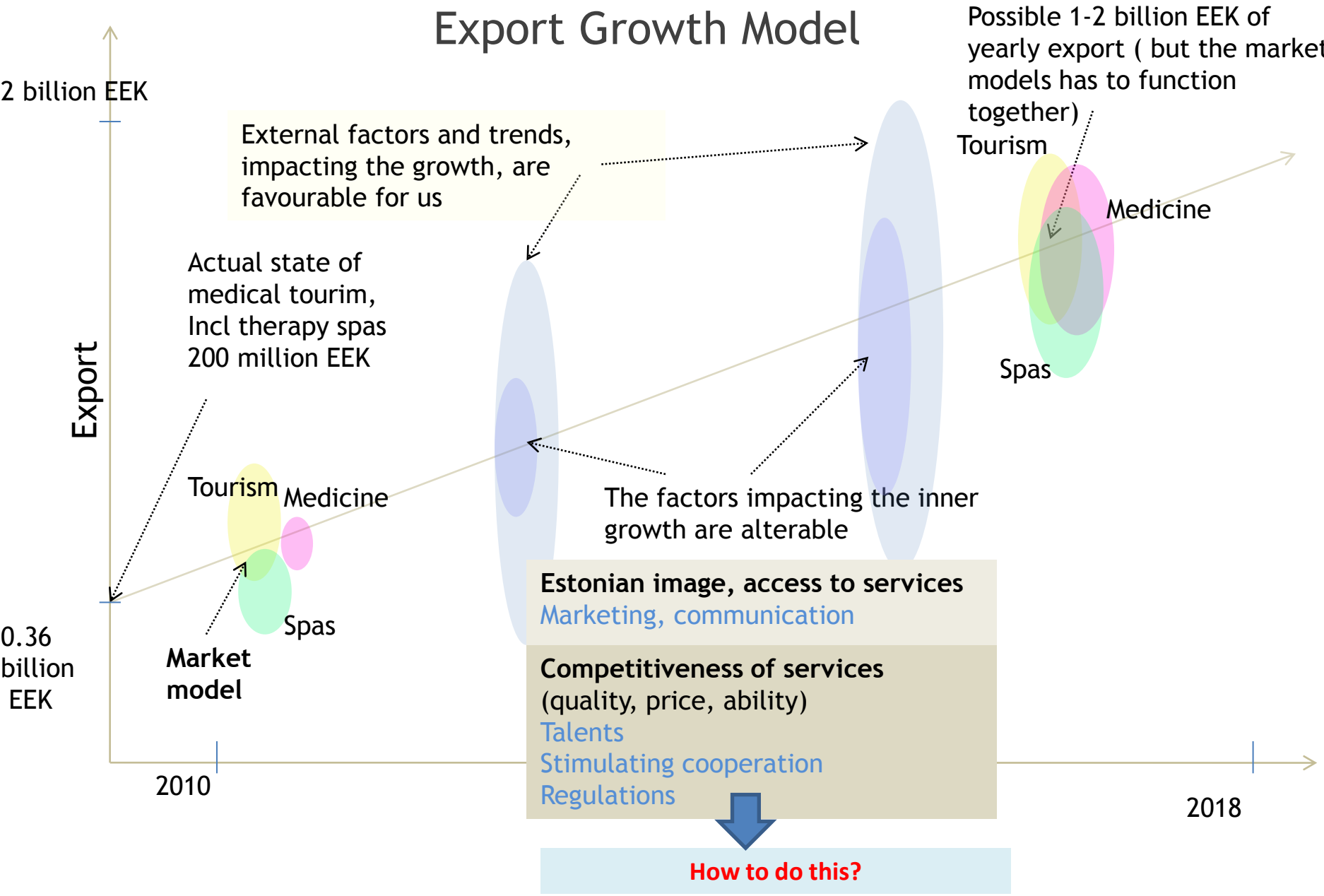
State strategies – the health care service export is advanced as state planned activity, e.g. Singapore (top centre of South-East Asia)

Cooperation of public and private sector – strategy based on the nation-wide consortium or agency with shared responsibility, both sectors having essential importance in development and responsibility, e.g. *London Medicine*.

Field-based strategies - based on common interests in (priority) development of corresponding field, the goal is to create a strong niche, e.g. Hungary

Strategy of private enterprises - approach based on conscious development of the provider or an operator into the top centre of service export, e.g. Bumrungrad hospital in Thailand

Export Growth Model

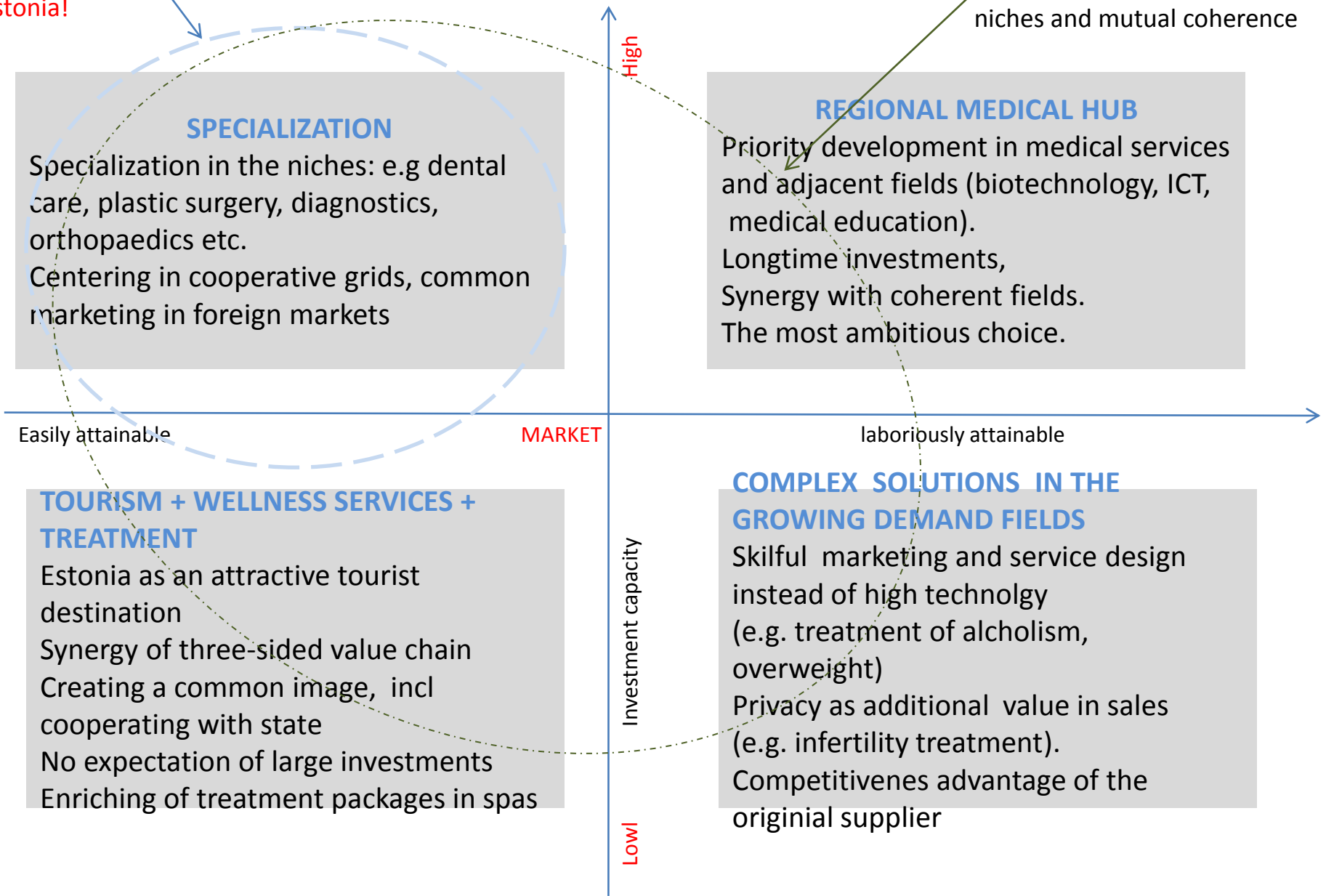


Source: Development Fund 2009

The strategic choices in Estonian health care service export

The best starting point for Estonia!

Simultaneous development other niches and mutual coherence



SPECIALIZATION

Specialization in the niches: e.g dental care, plastic surgery, diagnostics, orthopaedics etc.
Centering in cooperative grids, common marketing in foreign markets

REGIONAL MEDICAL HUB

Priority development in medical services and adjacent fields (biotechnology, ICT, medical education).
Longtime investments,
Synergy with coherent fields.
The most ambitious choice.

Easily attainable

MARKET

laboriously attainable

TOURISM + WELLNESS SERVICES + TREATMENT

Estonia as an attractive tourist destination
Synergy of three-sided value chain
Creating a common image, incl cooperating with state
No expectation of large investments
Enriching of treatment packages in spas

COMPLEX SOLUTIONS IN THE GROWING DEMAND FIELDS

Skilful marketing and service design instead of high technology (e.g. treatment of alcoholism, overweight)
Privacy as additional value in sales (e.g. infertility treatment).
Competitiveness advantage of the original supplier

Investment capacity
High
Low

Time

2018

2028

3 recommendations for action

1

Creation of cooperation stage (public and private)

Establishment of cooperation stage of public and private sector of Estonia would be functional for developing the health care services export – a health care services export agency

1

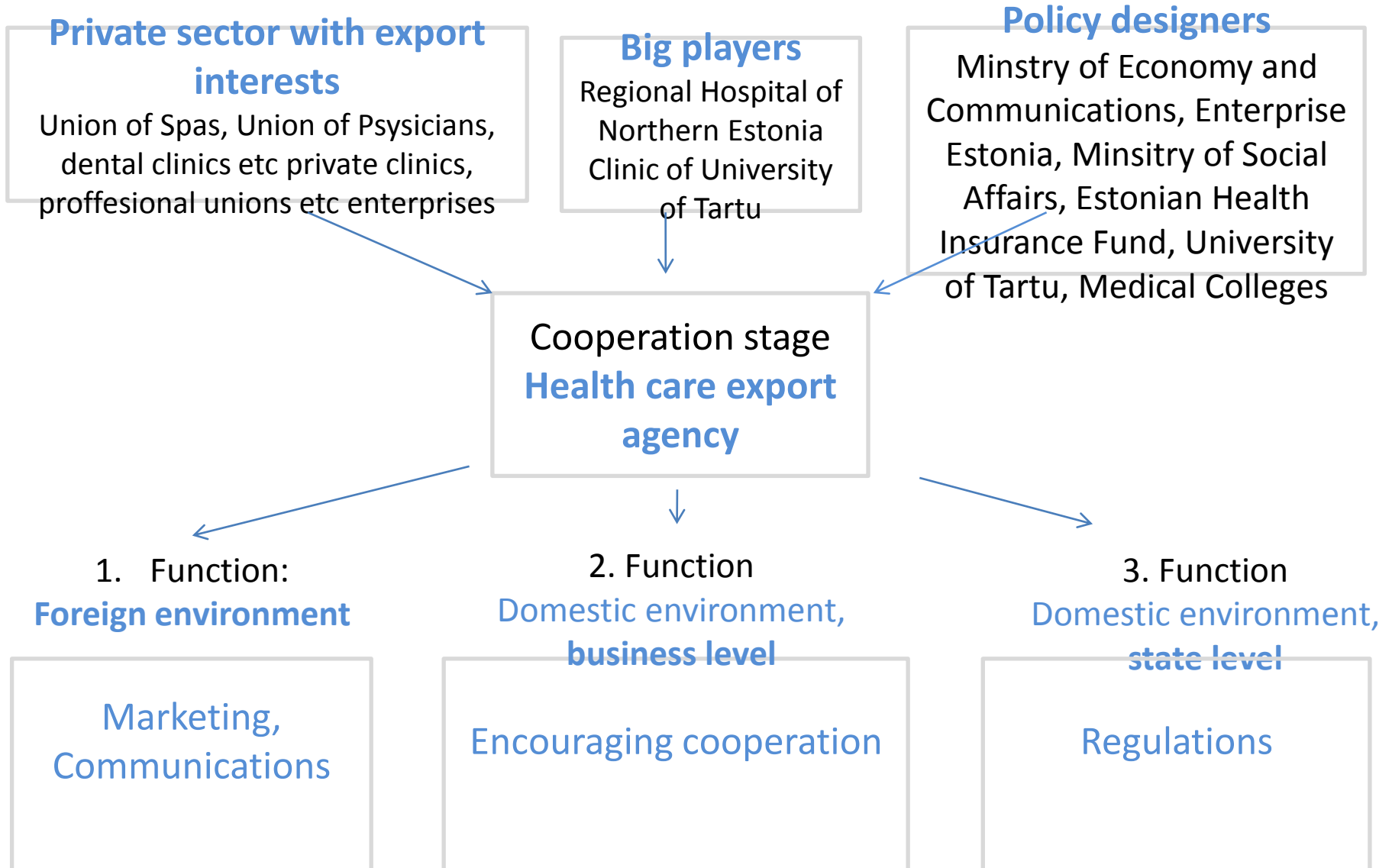
Creation of cooperation stage (public and private)

The tasks of the agency would include among others:

- Vigorous marketing of Estonian image
- Developing of international strategic cooperation
- Participating in the creation the policies of the adjacent fields (economy, export, health care and education)
- Supporting the cooperation of health care and adjacent fields
- Coordinating the investments of capital and in technology (both national and foreign investments)

1

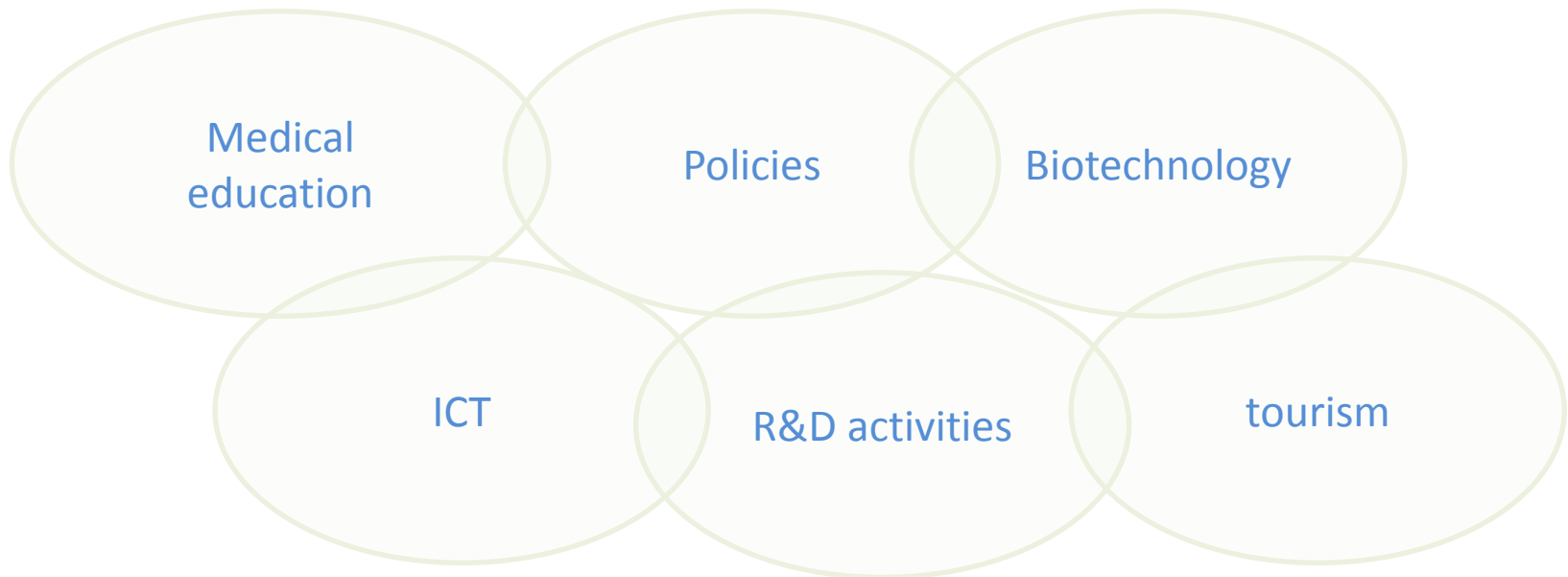
Possible structure of cooperation stage



2

Integrating adjacent fields

For developing the prerequisites of health care service export integration of the adjacent fields important to the implementation of export strategies must be kept in mind from the beginning.



3 Analysis of the target markets and needs of tourists or importance to raise the sensitivity of market

- Somewhat lower obstacles in entering the market in Finland and North-West Russia but...
- Definite benefit in carrying out further studies of every strategic field in health care services
- In working out the export strategy the need of further analysis of tourist flow to Estonia