



PROGRESS REPORT – HEALTHCARE TOURISM

EVENT DETAILS:

1. Title: *The Entrepreneurial Discovery Process in Albania: Partnership with the quadruple helix Actors in developing the country “Smart Specialization Strategy” – The healthcare tourism*

2. Location and Venue: The roundtable for healthcare tourism was held at the Hotel Mondial on the same day as the roundtable for maritime tourism, which was November 9, 2022.

3. Panel Members and A Brief Description of Their Professional Commitments

- ✓ **Mr. Arben Shkodra:** Secretary General of Albania Manufacturing Union (AMU) , Member of the Inter - Institutional Working Group and moderator of the events
- ✓ **Mrs. Matilda Naco:** Executive Director of the Albanian Tourism Association (ATA)
- ✓ **Mrs. Mira Rakacolli:** Deputy Minister of Health

4. Event Organizers

With the support of the European Commission's Joint Research Center (JRC) and the Policy Answer Project (Horizon Europe GA 10105887), Future Center organized this activity in collaboration with Inter-Institution Working Group, particularly Mrs. Albania Tole, who has played a pivotal role in identifying and engaging strategic actors from the public sector and academia; and the Albanian Tourism Associations (ATA) which was selected by Future Center to assist in reviewing the contact lists prepared for the business helix and to urge the representatives from this helix to participate at the event.

5. Event Participants

The healthcare tourism in this event was represented by nine actors from the business helix including representatives from the Albanian Tourism Associations (ATA), Albanian Manufacturing Union (AMU), dental and aesthetic clinic as well as national travel agencies. As from the Academia, we had the participation of seven representatives from 4 different universities including “University of Medicine” Tirana, “Lady of Good Counsel” University Tirane, “Ismail Qemali” University Vlore, as well as “Aleksander Moisiu” University Durres. The government helix on the other hand , had representatives from the Ministry of Health and Social Protection with the participation of the Deputy Minister, as well as the Ministry of Education and Sports. Civil society, on the other hand was not presented within this meeting as a result of the absence of civil society groups that analyze and support the development of this newly growing sector in the country.

Businesses: 9 Participants; Academia: 7 Participants; Government : 2 Participants; Civil Society: 0 Participants

ACTIVITIES & OUTPUT

1. Planning

Future Center's initial step during the planning phase was to identify strategic stakeholders representing all four dimensions of the quadruple helix within the healthcare industry. Throughout this process, the focus for the business helix was mostly on Tirana's largest dental and aesthetic clinics, which are also the most popular for the healthcare tourism in Albania. Concerning the remaining dimensions of the quadruple helix, we have encountered significant challenges, particularly in locating representatives from the civil society, This is partially owing to the fact that only few

civil society organizations in the country have this sector as one of their key areas of focus, as it is a relatively new sector that has emerged only recently.



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Some other details that were covered during the planning phase as in the rest of the activities were also the preparation of the logistics coordination and moderation methodology, the preparation of graphic design materials, as well the coordination with the Albanian Tourism Association in regards to the role that this organization will have during the tourism related activities. Other aspects discussed and agreed with the rest of the interinstitutional working group were also an approximate number of expected participants, the date of the event as well as the key topics to be covered during the roundtable discussions, in accordance with the EDP methodology.

2. Coordination & Promotion

With the revision of the contact lists by Mrs. Albana Tole for the academic and public sector helix, as well as Mrs. Matilda Naco for the private sector and civil society helix, we then communicated the invitation to the panel members. From there, we address all the logistics needs of the event such as the venue, catering, promotional materials etc. Last but not least, in accordance with the contact list generated for this event, we disseminated the invitations, collected the confirmations from individuals who expressed an interest in attending, and sent a last reminder with all the necessary event details.

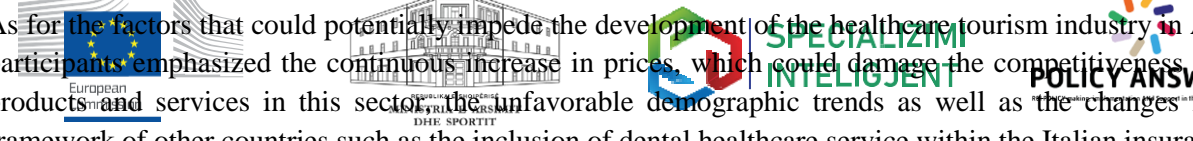
3. Execution

On the day of the event, Future Center staff covered aspects such as preparation of the venue, the registration of the attendees, the logistics coordination of their service providers for the catering, microphone system, projector, and other equipments, the documentation of the key moments of the event through photographs, note taking, the presentation of the scope of this initiative to the participants, and last but not least the moderation of the discussions among the participants, which according to the moderation methodology were structured around two main pillars being:

- A. The opportunities, obstacles, progress, and outlook for enhancing the sector's performance
- B. The identification of strategic objectives and relevant measures for boosting the sector's performance.

4. Summary of Comments and Suggestions

- ✓ According to representatives of the so-called "quadruple helix," health care tourism has been on the rise in recent years, particularly in the fields of dentistry, aesthetics, ophthalmology, and otology, for which the increase in flight frequency and variety of flight destinations was cited as one of the primary factors contributing to the expansion of the healthcare tourism industry in Albania. In addition, they noticed that dental treatment represents the largest part of healthcare tourism in the country, despite an upward trend being observed in all of the previously mentioned sectors.
- ✓ The business helix also discussed the types of people who come to Albania for healthcare tourism, categorizing them into two main groups: 1) Tourists who reside in countries with lengthy wait times for medical care, such as England; and 2) residents of neighboring countries whose healthcare service fees are significantly higher when compared to Albania such as Italy for the dentistry or Poland for the Aesthetics.
- ✓ Regarding the sector's comparative advantages, the quadruple helix actors mentioned, in chronological order: 1) the high standards of services and goods that are offered within this sector, which are comparable to those of the Eu 2) The competitive market prices 3) The adaptability and convenience of scheduling.



✓ As for the factors that could potentially impede the development of the healthcare tourism industry in Albania, the participants emphasized the continuous increase in prices, which could damage the competitiveness of Albanian products and services in this sector, the unfavorable demographic trends as well as the changes in the legal framework of other countries such as the inclusion of dental healthcare service within the Italian insurance system.

✓ As for the strategy that must be implemented to ensure the sustainable development of this sector, the business helix emphasized the need to further improve the quality of the healthcare service to ensure that it remains on par with that of developed countries, to carefully manage the continuous increase in prices to ensure that they remain competitive with other countries, and last but not least to strengthen the aspects of accessibility.

✓ In addition, the actors in the quadruple helix indicated that the positive trend of this sector has been analyzed only from an empirical standpoint so far as a result of the lack of data that provides more detailed information about the progress of this sector and the potential it represents for the country's economic development. For this reason, as the first step towards smart specialization in this area, the quadruple helix actors emphasized the need to assess 1) the historical success and projected trends of the healthcare tourism industry in Albania 2) the identification of the most frequently requested services by foreign patients as well as other factors that can help in better meeting their needs. 3) a comparison of the quality and cost of services in Albania with those in other WB countries and beyond 4) A detailed description of the type of individuals to be targeted for the creation of a proper strategy for the development of healthcare tourism in Albania. Furthermore, in order to better address this issue, the business helix emphasized the need for the development of an Albanian strategy for healthcare tourism development, as well as the need for a periodic collection and analysis of data from foreign patients with the intervention and support of the Dentist's Order.

✓ An additional suggestion made by the business helix for fostering this sectors' growth was also the implementation of appropriate mechanisms that encourage the formation of agencies that deal with the organization of individuals and groups visiting Albania for its healthcare services, the enhancement of their "tourist package" by combining elements like cultural tourism, gastronomy, etc. with the healthcare tourism, and the effective marketing of such services to target areas.

✓ As for the education system, unlike the other sectors that have been analyzed for the Albanian smart specialization, the representatives from the academia claimed that the performance of the helix they represent has improved significantly over the past few years. Particularly, they emphasize that the primary factors that have contributed to the development of the performance of Albanian universities offering healthcare-related programs have been the creation of contemporary curricula that meet market demands, the equipping of university laboratories with the necessary devices for teaching digital dentistry, and the creation of joint programs with foreign universities. Despite this fact, the representatives from the academic and business helix indicated that, in order to secure the long-term growth and sustainability of the sector, it is extremely important for steps to be taken to prevent experts from leaving the country in pursuit of better living and employment conditions. In particular the representatives from the Albanian universities indicated the necessity to develop a successful business model for the Albanian universities that include but is not limited to the provision of training programs, business consultancy, and scientific research on a departmental level while also guaranteeing their financial independence, something that is currently lacking due to the lack of the implementation of law on scientific research.

✓ Regarding the legal framework of the Albanian healthcare system, the business helix says that it typically addresses all the issues encountered in this sector, while they emphasize the necessity for there to be a greater monitoring of

- ✓ Other suggestions made for the development of this sector included the preparation of an action plan for the Albanian Tourism strategy, as this document does not yet exist, and that a more reliable energy and water supply system be guaranteed, identified as one of the most problematic aspects by the business helix in their day-to-day activity.

- ✓ Regarding curative tourism, which was another topic extensively discussed during the meeting, the quadruple helix actors emphasized that even though the country possesses every natural resource required for the development of this sector, little to no effort has been made for leveraging its potential. As for the problems encountered in this sector, in addition to the lack of data, other aspects mentioned were also the competition from neighboring nations and a dearth of young people willing to live in rural areas and work in this sector. Despite these challenges, civil society emphasized the necessity for this sector to be further analyzed given the significant potential it represents for developing year-round tourism in Albania.

- ✓ As for the measures proposed, one of them was to locate and uncover the natural resources required for the development of this sector, as well as the necessity to evaluate their existing condition. During the meeting, it was also proposed for hotels located in areas where this sector can flourish, to diversify their offer by setting up in-house healthcare clinics. As for the changes in the legal framework, the business helix indicated that there is an unchecked rise in the number of tour operators across the country, which is inconsistent with the speed of growth of the Albanian tourism sector. Taking this element into account, the quadruple helix actors highlighted the necessity for a number of criterias to be present that each individual must fulfill in order to be able to operate in this field. Finally, civil society brought attention to the importance of strengthening the role of the local government in support of the growth of the curative tourism in Albania.