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## **THE COMPETITIVENESS OF MEDICAL AND RECREATIONAL SERVICES IN UKRAINE<sup>1</sup>**

The article analyzes the need, conditions, external and internal factors of the competitive advantages of Ukrainian medical and recreational services at the global market. Natural and acquired elements of the national wealth of Ukraine, necessary to accomplish this goal are disclosed. It is recommended the ways to increase the international supply of these services.

**Key words:** competitiveness, global market, medical and recreational services.

**JEL Classification:** F02, I11.

**Problem setting.** A breakthrough in the economic development of Ukraine and decent positioning in the global market are caused by the increase of competitiveness of national products and services. Ukraine in terms of global competitiveness occupies 79th place among 144 countries according to the report «The Global Competitiveness Report 2015-2016», published by the World Economic Forum in

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Davos [1]. For the one year Ukraine has lost 3 positions, now it is located between Guatemala and Tajikistan. The reasons are the loss of a quarter of GDP due to hostilities in Donbass (East Ukraine), irrational structure of economy, trade war from Russia, inflation and devaluation, growth of domestic debt. Slow reforms and a large share of shadow market in the national economy also play the negative role. Therefore, actual scientific task is to search for ways to improve the competitiveness of the national economy and their segments sustainably to grow in the long term.

**Recent research and publication analysis.** The problems of competitiveness of the national economy of Ukraine (in one aspect or another) consider such domestic scientists as L. Antoniuk, V. Bazilevich, J. Bazilyuk, A. Chukhno, Z. Varnaliy, A. Galchinsky, N. Grazhevska, A. Ignatyuk, P. Eshchenko, J. Zhalilo, V. Kornivska, I. Markovych, L. Pronkina. V. Radchenko, A. Shegda and others. They study different aspects, namely: features of international competition; the impact of global liquidity, world crises and booms on the national competitiveness and integration of Ukraine into the world economy. As a rule, in their publications they call agriculture, military production, energy, aeronautics, IT-sector the major competitive segments of the Ukrainian economy. L. Pronkina considers it necessary «to enhance the optimal government interference in the regulation and economic management» for strengthen national competitiveness. She focuses on the revitalization of industrial policy [2]. But as to health care, it is usually considered not in the international but in the national perspective. The most of the publications are devoted to the traditional influence of this industry on the livelihoods of citizens, the human development and efficiency of intellectual capital.

**Paper objective.** But the purpose of this article is, on the contrary, to reveal the need, conditions and factors forming the competitive advantages of Ukrainian medical and recreational services at the global market.

**Paper main body.** In general, the index of Global Competitiveness are influenced by the following leading pillars: the quality of institutions, infrastructure, macroeconomic environment, health and primary education, higher education training, goods market efficiency, labor market efficiency, financial market development, technological readiness, market size, business sophistication, innovation. Meanwhile for less developed economies competitiveness is determined by other factors. At the end of the XIX century, Swedish scientists Eli Heckscher and Bertil Ohlin concluded that international trade is the exchange of relatively abundant factors of production on relatively scarce factors. And relative prices in different geographical locations depend on the relative scarcity of these factors. If in the developed countries the factors of competitiveness are capital, new technologies, intellectual product, in those countries, which are behind the technological progress, they are factors of nature and price of labor.

There should also remember the names of scientists of Ukraine such as S. Podolynsky, V. Vernadskiy, M. Rudenko. They developed a scientific theory of physiocracy for a long period, from the late of the XIX until beginning of the XXI century. It is known that the founder of this school was F. Quesnay, who proceeded from the fact that society development is subordinated to the laws of nature. Ukrainian scientists have also considered the nature and energy of space a major global factor for the development and wealth, regardless of its location. Ukraine presently has unique therapeutic natural resources — nearly 100 deposits of curative mud and over 400 mineral springs. Thereby, our national economy can become competitive in some segments of medicine and recreation. Most often at these resorts citizens of Ukraine are treated which contributes to their work ability, vitality, longevity and well-being. Indirectly, this affects the national competitiveness because one of its pillars is the state of health care. At the same time competitive healthcare segments may help Ukraine to position itself in the global market.

Why this direction is necessary for Ukrainian economy? Because it corresponds to the global trend. The peculiarity of new economy is a faster growth of the tertiary sector (intangible economy, services industry) compared to the primary and secondary sectors (which together form the material production). In Ukraine, the growth of the tertiary sector is also observed, but it is mainly through traditional trade, not through modern and social services. According to the State Statistics Service of Ukraine, in January-October 2015 export of services (\$ 7020,5 billion) constituted only 22.4% of export of tangible goods (\$ 31341,7 billion). And in the IV quarter of 2015 health and social care accounted for only 2.5% of the total volume of the non-financial services [3]. Therefore our national economy need in progressive restructuring and development on post-industrial basis.

Ukrainian economy has a long trend of a growth of share of raw materials in the export structure, because coal, manganese, iron ore and other minerals mining are owned by major oligarchic groups-clans. They are so successful not so much due to their entrepreneurial abilities but to appropriation of surplus profits in the form of natural rent, as well as their monopoly position, combination of business and authorities. But the export of raw materials is largely dependent on global and European conjuncture and crises. For example, today there is decrease of their world prices. Accordingly, trade balance of Ukraine in 2006-2013 was predominantly negative. In particular, in the prewar 2013 the excess of imports over exports of goods amounted to \$ 8.5 billion [3]. During two last years there was a such negative impact on the economic situation as «hybrid» war of Russia against Ukraine, which includes trade war. According to the State Statistics Service of Ukraine, in January-November 2014 and 2015 the export of Ukrainian goods to Russia fell respectively by 32 and 53.2% compared with the corresponding period in 2013 and 2014 [3].

Given that medical and recreational services are reflected in the current balance of payments, they positively affect this balance. That is why promotion of services at the global market, their diversification, predominance of exports of goods have no alternatives in equalizing the balance of payments of Ukraine, survival and development of the our country.

It is important, that export of these services means providing them directly at the territory of Ukraine. Services don't have real substance; they are intangible and are not subject to storage and transportation. It is impossible to transport them to other countries as a commodity (except telemedicine). Therefore, if other things being equal, illegal accumulation of capital due to natural rent and the outflow of money to offshore tends to a minimum. Usually it is carried out by various semi-legal schemes used by oligarchic business to export tangible goods. According to international non-governmental organization «Tax Justice Network», Ukraine entered the top 20 countries with the indicator Volume of money (\$167 billion) hidden by wealthy individuals in secret tax havens at the end of 2010 [4]. Moreover, the territoriality of services rendering improves, by the investment multiplier, the gross regional product and employment, creates local target markets, additional revenues to them, and promotes competition among them. This is very important in terms of future decentralization of Ukrainian economy. Competitive market is also a sign of high quality institutions and pillars of national competitiveness.

Conditions for the formation of competitive advantages of Ukrainian medical and recreational services should be sought in the peculiarities of international supply and international demand. As most of medical and recreational services has a limited mobility, their international supply has a low elasticity and poorly responses to price changes. Supply of services using rare, unique therapeutic natural resources is generally not elastic. Exclusivity of a service facilitates its holders (including Ukrainian state) attracting consumers, to positioning themselves at the global market and obtaining certain advantages in the international monopolistic competition. Moreover, international demand for medical services is highly price elastic, that is, in terms of other conditions, even a small decrease in their prices leads to an increase in the number of consumers. Flexible pricing for the provision of medical services, taking into account seasonality, allows not rich countries to win in certain segments of the international competition.

Another condition of competitiveness of medical and recreational services is their combination with complementary tourism services. In general, they increase the useful effect for consumers. The results of recovery are better when a patient adds to treatment thrills of visiting a new country. Competitiveness of medical and recreational services includes not only the price, decent quality and differentiation of services, small queues or lack of them, but also a degree of

landscape diversity and climate comfort, transport availability, opportunity to learn the country's history, its monuments, folk customs, which as well attract medical tourists.

The factors of competitive advantages of Ukrainian medical and recreational services are formed primarily outside the domestic market. Mainly they include: dynamic globalization, development of global markets of investments, labor, goods and services, removal of cross border barriers, information infrastructure. International tourism has a very dynamical development because of its high profitability, namely the cost of creating one job in tourism is much lower than in industry. According to a report published by Transparency Market Research the volume of world medical tourism market in 2012 amounted to \$ 10.5 billion and is projected to reach in 2019 32, \$ 5 billion; during 2013-2019 it will grow by 17.9% [5]. The main players in this market, except the developed countries, are Israel, Turkey, India and other countries of Asian region. Incidentally, according to Bloomberg agency, in the world ranking of health care in 2014 and 2015 respectively Singapore and Hong Kong took first and second places (among 51 countries with a population of at least 5 million people, per capita GDP at least \$ 5 thousand and life expectancy of at least 70) [6; 7]. Globalization and medical tourism to Ukraine, mostly of residents of neighbouring countries and Asia, had gained popularity yet before military actions in the East of the country.

Competitive advantages of Ukrainian medical and recreational services are inadvertently increasing against the background of a steady increase of the cost of treatment in developed countries. Especially, this trend is typical for the USA. Thus, according to the OECD, during 1980-2013 the share of health care costs in the United States GDP increased by 2 times (from 8.2 to 16.4%) [8]. Growth factors are not only expensive new technologies as such but also the fashion for new types of examination and treatment, as well as population aging, occurrence of new diseases, rising costs of new drugs developing, aggressive marketing of pharmaceutical companies. The nutrient medium for the growth of costs is the informative asymmetry about quality of the medical services for patients — a specific feature of health market. It allows physicians to increase unjustifiably the quantity of services and therefore the cost of treatment, which is a barrier for patients, their employers, social funds and companies.

Opponents may argue that in the structure of US health care spending public expenditure grow more rapidly. Indeed, during the period from 1980 to 2012 the share of public expenditure in GDP increased almost in 2.2 times (from 3.5 to 7.9%), while private one — almost in 1.8 times (out of 4.8 to 8.5%) [8]. And in the years 2000-2013 the rate of growth of public funding accelerated. But, firstly, the government does not cover the full amount of the patients cost and leaves a franchise

(as, to the word, and private insurance companies). Secondly, obtaining insurance police is often burdened with bureaucracy and red tape. The average American spends 50% more on health care, and 3 times as much on health care administration, than the average Canadian [9]. Often bureaucracy is caused by thoroughness and slow approval of new drugs and treatments by «U. S. Food and Drugs Administration». By the way, this is a very expensive process for pharmaceutical companies, which also increases the cost of treatment. All these factors switches demand of US citizens on foreign treatment.

In European countries, medical care is originally more socialized and isn't predominantly funded by private funds. However, the share of health expenditure in GDP is also growing. From 1980 to 2013 the growth amounted ranging from 1.2 times in Denmark (from 8.4 to 10.4%) to 1.9 times in Portugal (from 4.8 to 9.1%). The highest level of funding in 2013 was observed in Netherlands — 11.1% [8]. Moreover, in the European region there is an additional, hidden reserve to switch demand of citizens on foreign treatment. It is associated with long waiting list in hospitals. The fact is that, in contrast to the free market where equilibrium prices are formed spontaneously (based on the equality of supply and demand), in the European medical market government usually sets the upper limit of prices for medical services. So it exercises rationing, ranking of medical services, restraining public spending on health care, ensuring the constitutional principle of equal access to it for all citizens. Medical tourists are also traveling abroad for the purpose of confidentiality, especially in the case of plastic surgery.

Among the internal factors of the medical and recreational services competitiveness in Ukraine the main are lower prices than international ones. Over the past two years these relative prices generally declined due to the rapid devaluation of the national currency. Thus, US dollar and euro exchange rate of the National Bank of Ukraine as of June 1, 2013 amounted to 7.99 USD and 10.40 EUR, and on December 31, 2015 — UAH 24.0 and 26.22, that's hryvnia depreciated against these currencies in 3 and 2.5 times [9]. This trend is beneficial for foreign consumers of Ukrainian services because of their ability to pay in our market grows. Competitive advantages of Ukrainian services are also caused by the to low-wage medical workers. Thus, the average salary of a full-time employee in the economy of Ukraine in December 2015 amounted to 5230 UAH, while in health care — to 4076 UAH. According to the exchange rate of the National Bank of Ukraine on December 31, 2015 it was equal respectively 217.9 and 169,8 USD or 199,5 and 155.6 EUR [3; 9]. Some of foreign medical tourists also want to save on excessive comfort that can be much more expensive at their homeland. Less strict regulation of medical care by legislation and insurance companies also positively affect competitive advantages of our service.

Demand is increasing for dental and ophthalmic treatment, pediatric cardiac surgery, reproductive medicine, MRI diagnosis, laboratory studies, aesthetic medicine and cosmetology, plastic surgery in Ukraine. There are certain achievements in reconstructive neuroorthopedics, radiological medicine or radiosurgery. Usually the demand is put forward by foreigners-emigrants from Ukrainian and representatives of the diaspora in Canada and the United States and citizens of the neighbouring countries. Know-how of Ukrainian scientists is the technology of strabismus treatment in children aged 6–8 months by soldering the Fresnel micropisms in spectacles lenses. It enables to reduce the number of surgical operations to one. In addition, the interest of the patients from the foreign countries on a unique stem cell therapy is increasing. In Ukraine, cell therapy as the most promising innovative field of medicine, is developing in the following areas: chronic ischemia of the extremities, necrotizing pancreatitis, trauma and burns.

Unfortunately, in Ukraine a great portion of stem cell therapy have carried out on the shadow market for a long time. This is due to the imperfection of the legislation and the oligarchy in power. Even so today a significant progress in this area associated with solution of many law and ethical issues is marked. The technology of creating cells, which have the potential of embryonic stem cells, without using human embryos, has been developed. In Kyiv private clinics have appeared which grow the patient's bone from his own stem cells (instead of the traditional grafting) and skin after severe burns. With the beginning of hostilities in the East of the country and vast increase in the number of injuries, the demand for cell production rose sharply.

As for recreational services, Ukraine has extensive natural potential, even without the resources of annexed Autonomous Republic of Crimea. The total area of natural recreational landscapes in Ukraine is 9.1 million hectares (15% of the territory), and their simultaneous capacity — nearly 50 million people. Azov-Black Sea region is rich in curative peat and silt mud, the Dnieper-Dniester region and the Carpathian region — in radon and mineral water of the different chemical composition, with the general use of over 64 thousand cubic meters per day. At Ukrainian health resorts patients with disorders of musculoskeletal, digestive systems, gynaecological and lung diseases, etc had been effectively treated and rehabilitated for many years. In Ukraine in prewar 2013 there were 2,829 sanatorium-and-spa institutions (without camps for children) with a total capacity of more than 406 thousand beds during a month of the maximum deployment. In 2014 these numbers excluding the Crimea and the zone of the antiterrorist operation, were respectively 1928 and 270 [3]. The therapeutic potential is complemented by the «green» tourism, especially in the Carpathian region, which is located at the crossroads of Western and Eastern Europe. Its attractiveness is enhanced not only by advantageous geographical position, but also by construction of small campsites,

small hotels, and guest houses. Ukraine has access to the two seas (the Azov and Black). Over 70 thousand rivers run on its territory (the largest — Dnipro, the third longest river in Europe), and over 3 thousand natural lakes and 22 thousand artificial reservoirs. By number of forest plantations Ukraine takes one of the first places in Europe. There are over 6,700 natural reserve territories, including 20 nature reserves, 11 national parks.

The degree of landscape diversity and favourable geographical position are potential factors of the competitiveness of medical tourism in Ukraine. But if they are to become effective factors of international competition, it is necessary to improve the access to the areas providing the services through a developed transport and communication systems. Despite significant depreciation of rolling stock and insufficient investment, Ukrainian railway is the primarily type of transport. In 2015 it secured 36.4% of total passenger traffic. Road and air transport provided respectively 35.7 and 11.7% [3]. But the conditions of many roads are terrible and constitute a threat to emergency situations; their construction is accompanied by growth of the shadow economy. The airline industry in Ukraine is monopolized, as a result prices for flights are high. So far, signing an agreement with the EU on a single airspace is only a prospect.

Shortcomings in management and marketing in the Ukrainian health care system, as well as opportunistic behaviour of some physicians, who frequently change the terms of agreements with potential patients and are prone to sudden changes in their intentions and behaviour, increase the transaction costs and the price of services. Insufficient comfort for patients, its discrepancy with international standards decrease competitive advantages of Ukrainian medicine. A lot of medical professionals in Ukraine don't know English, making it difficult to attract customers from abroad. There is also the risk of reducing the competitive advantages of health care in Ukraine because costs of the geomarketing, branding, social research, law and financial services are rising. The latter give possibility to respond to the dynamic and increasingly individualized demand for services, to detect the barriers affecting the consumer choice and the degree of dissatisfaction with the quality, etc. Some resorts can't ensure a year-round recreation. As a result, according to various estimates, only from 10 to 20% of the total number of the mineral water springs and the therapeutic muds are used in Ukraine. But the strongest negative factor influencing the competitiveness of the medical and recreational services in Ukraine is the danger of staying in the country due to the hostilities in Donbass. That's why really promising are medical institutions and recreational facilities of Central, West, and partly South of Ukraine.

**Conclusions of the research.** Creation of a competitive segment of medical and recreational services at the global market (in addition to agriculture, energy, defence industry and IT-programming) aims at restructuring economy of Ukraine,

acceleration of services export compared with export of goods, effective positioning of the services at the global market and getting out of the economic crisis. Absolute competitive advantages of medical and recreational services in Ukraine are associated with the lowest price of labor in Europe under condition of a proper quality. Comparative competitive advantages reflect the decline of relative prices of these services under the rapid growth of health care costs in developed countries. Non-price factors of international demand for them are exclusivity of some types of treatment, queues for planned operations in other countries, searching of confidentiality by patients, uniqueness and richness of natural resources of Ukraine, an extensive network of medical, sanatorium-and-spa institutions, recreational facilities, a big experience of the spa treatment. Involvement of medical tourists to Ukraine requires the legislative support of their treatment and security, improving of the quality and reliability of services, development of transport, communications and other infrastructure, raising the level of comfort in line with European standards. It's necessary to create a favorable investment climate for financial support of new treatment technologies, and introduce health insurance, increase the regulatory role of the medical associations that have to plan export of services. The task are also to reduce shadow economy and corruption, particularly in health care system, liberalize conditions for medical business, guarantee an effective use not only of public finance but also of foreign grants and money from sponsors.

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## **КОНКУРЕНТОСПОСОБНОСТЬ МЕДИЦИНСКИХ И РЕКРЕАЦИОННЫХ УСЛУГ В УКРАИНЕ**

В статье анализируются необходимость, условия, внешние и внутренние факторы формирования конкурентных преимуществ украинских медицинских и рекреационных услуг на глобальном рынке. Раскрываются природные и приобретенные элементы национального богатства Украины, необходимые для достижения этой цели. Предлагаются рекомендации по увеличению международного предложения этих услуг.

**Ключевые слова:** конкурентоспособность, глобальный рынок, медицинские и рекреационные услуги.

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## **КОНКУРЕНТОСПРОМОЖНІСТЬ МЕДИЧНИХ І РЕКРЕАЦІЙНИХ ПОСЛУГ В УКРАЇНІ**

**Постановка проблеми.** За індексом глобальної конкурентоспроможності Україна посідає 79-те місце серед 144 країн. Актуальним науковим завданням є пошук шляхів підвищення здатності національної економіки стало зростати у довгостроковій перспективі.

**Аналіз останніх досліджень і публікацій.** Українські науковці розглядають різні аспекти міжнародної конкуренції та приділяють увагу зростанню конкурентоспроможності галузей матеріального виробництва й ІТ-програмування. Що стосу-

ється охорони здоров'я, то вона зазвичай розглядається в національному вимірі, з традиційної точки зору впливу на життєдіяльність громадян і людський розвиток.

**Формулювання цілей.** Обґрунтування необхідності, умов і чинників формування конкурентних переваг українських медичних і рекреаційних послуг на глобальному ринку.

**Виклад основного матеріалу.** Необхідність формування конкурентних переваг певних сегментів національної медицини та рекреації пов'язана з вектором на прогресивну структурну перебудову економіки України, її сталий постіндустріальний розвиток, позиціонування на глобальному ринку. Сьогодні в експорті переважають сировинні галузі, а зростання третинного сектору економіки відбувається за рахунок торгівлі, а не сучасних послуг.

Для сучасних розвинених країн внутрішніми факторами конкурентоспроможності є капітал, нові технології, інтелектуальний продукт, а для України — це унікальні лікувальні природні ресурси; нижча, за міжнародну, ціна праці медичних працівників, які мають досвід і відповідну кваліфікацію; значна девальвація національної валюти і, на жаль, тіньовий ринок медичних послуг, особливо у клітинній терапії. Мобільність ексклюзивних медичних і рекреаційних послуг обмежена, їх міжнародна пропозиція є низькоеластичною за ціною й доходами. Міжнародний попит на них є високоеластичним, що дозволяє надавачам послуг проводити гнучку цінову політику. Поєднання з компліментарними послугами туризму посилює корисний ефект від лікування і збільшує рентабельність бізнесу.

Зовнішніми чинниками конкурентоспроможності медичних і рекреаційних послуг в Україні є розвиток глобальних ринків інвестицій, праці, товарів і послуг; неухильне зростання вартості лікування у розвинених країнах, бюрократія при отриманні державної страховки, черги у лікарнях, пошук пацієнтами конфіденційності, особливо у випадку пластичних операцій.

**Висновки.** Надання конкурентоспроможних медичних і рекреаційних послуг в Україні потребує удосконалення законодавства в таких напрямках: лібералізація умов для медичного бізнесу; ефективне використання, крім суспільних фінансів, зарубіжних грантів і грошей спонсорів; подальше підвищення якості, надійності та безпеки послуг, рівня комфорту відповідно до європейських стандартів; розвиток транспорту, комунікацій, страхової медицини; надання медичним асоціаціям функції планування експорту послуг; мінімізація корупції в охороні здоров'я.

#### **Коротка анотація статті**

**Анотація.** У статті аналізуються необхідність, умови, зовнішні та внутрішні чинники формування конкурентних переваг українських медичних та рекреаційних послуг на глобальному ринку. Розкрито природні і набуті елементи національного багатства України, які необхідні для досягнення цієї мети. Пропонуються рекомендації зі збільшення міжнародної пропозиції цих послуг.

**Ключові слова:** конкурентоспроможність, глобальний ринок, медичні та рекреаційні послуги.