Emin Çakmak – Chairman, Turkish Healthcare Travel Council, Turkey

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Emin Çakmak, chairman of the Turkish Healthcare Travel Council, offers deep insights into the healthcare travel industry and how it stretches beyond the commonly used term of "medical tourism". Çakmak also elaborates on the current dynamics of the industry in Turkey, the features that have made the country a choice destination for foreign patients, and how the industry is positioned to become a significant vein in the healthcare system parallel to domestic care.

What makes the Turkish Healthcare Travel Council unique compared to similar organizations in Turkey?

There are many small associations in the region for medical tourism. What distinguishes our association from the others is that the Turkish Healthcare Travel Council (THTC) is fully dedicated healthcare travel, a boarder view on the industry which consists of eight segments. We are a founding member, and only member in Turkey, of the Global Healthcare Travel Council. This council was founded in Monte Carlo, Monaco in 2013. I have led the global council for two years, once from 20013 to 2014 as founding chairman, and as elected president from 2014 to 2015.

The reason we established the Global Healthcare Travel Council was to gather accurate statistics of the industry from each member country and create new regulations for international patients. In the five years since the formation of the Global Healthcare Travel Council, we have organized

several educational workshops in different countries and created an international code of conduct to be followed by member countries. This code is meant to establish an international standard of patient rights and ethical paradigms. Turkey was one of the first countries to accept and implement this ethical program.

How would you characterize the specificities of the healthcare travel industry?

According to our views of healthcare travel, we divide the industry into eight segments: medical tourism, dental tourism, spa and thermalism, wellness, sport health tourism, retirement tourism, culinary tourism, and accessible tourism. Although most stakeholders will use the term medical tourism, this refers primarily to surgery, whether it be small aesthetic surgery or essential organ transplants. Having eight distinct segments gives us a more detailed view of the industry as a whole. For example, dental tourism is a different segment because it is both surgical and aesthetic as well. Culinary tourism refers to detox and diet management services.

The THTC was started in 2005 to cover all these segments and we have members who are service providers in all eight segments of healthcare travel. Our data points are different from those of the Minister of Health because the ministry only engages with medical and dental tourism, while the other sectors are categorized under the Ministry of Tourism rather than that of Health. However, the ministries of health and tourism recently signed an agreement to recognize spa thermalism as a segment within medical tourism.

The duty of the THTC is to collect the data from the Ministry of Health and Ministry of Tourism and consolidate this information under one entity. We are holistically focused on healthcare travel, not just medical tourism. We believe that healthcare travel includes any action related to health and wellness. Eventually, even someone going on holiday for a week to rest their body or play sports can be considered as a healthcare tourist. The Global Wellness Council has projected USD one trillion of turnover sourced from tourists; they consider that all holiday trips can be identified as for the purpose of wellness. However, the THTC does not consider all these travels as wellness at the moment.

How has the healthcare travel industry developed in Turkey over the past several years?

Over the last two years, despite the crisis that included the 2016 coup and terrorism threats, medical tourism in Turkey did no decrease – far from that. Most tourists come from the MENA region and Russian republic countries; as well as Europe, the UK, and Ireland. In their home countries, the price of medical procedures is double and they often must wait a several months before they can have an appointment for treatment.

Across the eight segments, our estimate of revenues is close to USD 575 billion globally. Medical tourism alone accounts for approximately USD 100 billion – the rest is generated by the other segments. Last year in 2017, we had approximately 765,000 tourist overall coming to Turkey, producing USD 7.2 billion, in turn, over across all eight segments.

In terms of the most significant areas, 32 percent of patients come to Turkey to receive oncology care. Aesthetic procedures only account for a small portion of medical tourism revenues as they are low-cost, quick procures. Whereas on the other hand, oncology care is ongoing and requires patients to stay in Turkey for several weeks or even months. Turkey has become a center of excellence for oncology due to the investments into the sector.

What makes Turkey such an attractive location for foreign patients looking to receive health services outside of their own countries?

All medical procedures are performed under the ethical regulation of the Ministry of Health. In transplantation, without ethical approval, the patients cannot continue with their procedures. For example, the relationships between the recipient and donor are checked by independent ethical boards, which must approve all transplants. This is why patients prefer to receive care in Turkey – the close monitoring of ethical conditions.

The economic benefits of this industry are a secondary priority; quality care and service are Turkey’s first concern. Several countries perform procedures without ethical guidelines because they are seeking to gain economic benefit. In Turkey, transplantations are checked for compatibility, the best being immediate family to the fourth degree. We also screen to make sure donors are participating of their own free will without any monetary incentive or pressure from their families. In terms of success, we are ranked second globally and first in Europe. The Ministry of Health approves each all major medical procedures individually, such as bone marrow and stem cell transplants.

Due to the rigid pricing policy of the Turkish healthcare system, it has been said that innovative medicines are often delayed in the market. How would you assess the access of new treatments in Turkey compared to in countries of some healthcare tourists?

Speaking 15 years ago, it would be correct to say that Turkey receives innovative medicines after major markets like the US and Europe. Today, whatever has been approved by the FDA and is applicable in the US and Europe is also available in Turkey. Most pharmaceutical brands have manufacturing facilities here, and we produce many medicines domestically. For example, Akdeniz University in Antalya has a facility which internally manufactures personalized medicines for the oncology department, using specialized robots and technology. They can produce medicines 45 minutes before injection.

What is the facility allocation between foreign and Turkish patients? Are domestic patients priorities in the healthcare or are all patients treated equally?

We do not discriminate between foreign and domestic patients. Healthcare tourists have the same level of access and priority as Turkish natives in the healthcare system. As Turkey is a hospitable country, we even prioritize – to an extent – foreign patients as we realize our guests have limited time and added expense from travel and accommodation.

A common fear of medical tourists is the level of quality service in a country they are not familiar with. How is healthcare travel being controlled by the government to ensure excellence?

Healthcare travel is closely regulated by the government and specialty laws are in place regarding treatment methods. Not all hospitals can treat foreign patients, they must be accredited by the Ministry of Health. The THTC aligns itself with these principles and only promotes hospitals and clinics that are accredited by the ministry. This level of control is very unique to Turkey. We have over 2,000 hospitals in the country but only 375 are eligible to receive foreign patients. Each hospital is required to hire full-time staff who can speak the language of patients being received there. Some hospitals have up to 42 language professionals working in international relations.

Additionally, there is a range of fixed prices set by the Minister of Health based on the category of each institution. The Ministry of Health oversees the base price and the cost mechanisms of all healthcare institutions in Turkey. This price can then be adjusted according to the class ranking of

each institution individually.

Have there been any significant milestones or key projects completed by the THTC to facilitate healthcare travel in Turkey?

As the THTC, we have created special software to facilitate healthcare travel services online. Over three years, we commissioned 28 engineers and invested USD three million into the processing data. We created a cloud system of 165 offices in 91 countries around the world working for the council as network offices; covering even the major markets like the US, Australia, Canada, and Japan. The program, Map2Heal, is in 25 languages and integrated all our network offices into this B2B and B2C portal. Patients can upload their information for quick access and post their healthcare requests. Health institutions are categorized by their specialty and when patients create a request it is forwarded to all the clinics or hospitals in that category. The institutions can then examine each case to determine if they are capable of treating the patient and if so, they can respond to the request with a service offering. From here, patients can examine their available options, research doctors, compare costs, and select where they want to be treated. It is a very transparent system aimed to empower patients.

How do you see the sector developing in Turkey and what are your outlooks and prospects for the future?

Having worked to build the reputation of Turkey as a medical tourism hub for the last 13 years, I have several ambitions. Each year I organize two events regarding healthcare travel. Coming up, I have invited 256 doctors and 120 media personnel from 52 countries to a summit for the spa and thermalism segment. Under the patronage of the president, we organize HESTOUREX – health, sport, and alternative tourism summit. I am the chairman of advisory board for this organization and this year we invited 165 countries 5,017 buyers and journalist to our second yearly summit this past April.

Our targets are very ambitious, but I believe we can achieve them. We have a goal of reaching USD 20 billion in healthcare travel revenue by 2023. This year we will reach USD 8 billion with over 800,000 tourists. In two years’ time, we will have 25 more city PPP hospitals which will increase our capabilities of servicing patients, making Turkey a leading country worldwide in bed capacity. The current infrastructure is capable to taking care of domestic patients but our ambition with the president Erdoğan to build the city hospitals to serve not only our citizens but also help to solve the

healthcare crisis in other countries as well such as Africa and CIS. Turkey has 150,000 doctors, 10 percent of which are educated abroad having US degrees. We export our talent to integrate into the world medicine and bring the most innovative methods and ideas back into the country.

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