

Turkey: Your Partner in Healthcare

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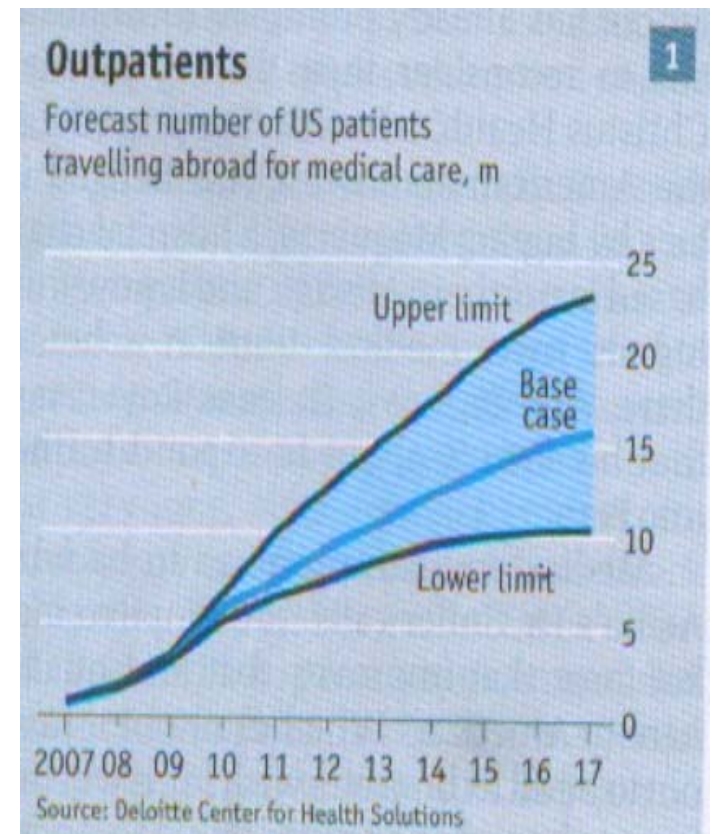
*on behalf of Meri Bahar,
Chairwoman of TALK Health Committee*

Why receive care abroad?

- **ACCESS BY PATIENTS:**
 - 46 million Americans (18% of population <65) were without health insurance in 2007
 - 90 million Americans (30% of population <65) spent a portion of 2006 or 2007 without coverage
- **COST TO EMPLOYERS:**
 - Average cost increased by 5% from '06 to '07; general inflation during the same period was 3.9% and wage increase 3.5%
 - % of firms offering retiree benefits have declined steadily
- **Globalization and increasing # of expatriates**

How widespread is medical travel?

- Lack of comprehensive data
- The Deloitte 2008 Medical Tourism Report:
 - Estimated 750,000 Americans traveled abroad for care
 - 39% said they would, if cost was half and quality was comparable
- McKinsey Report on Medical Tourism (2007)
 - 60 billion USD worldwide, 100 billion USD in 2012



Various arguments against medical travel

- Quality
 - Variations in care across the US
 - External, objective quality evaluation
- Follow-up care
- Risks associated with long flights
- Blood safety

Why Turkey?



Why travel to Turkey for care?

Middle East, Central Asia and Eastern Europe

- Lack of technology
- Lack of professional providers in some specialties
- Better clinical outcomes

Western Europe

- Waitlists
- Non-covered services
- Genetic diagnosis & treatment
- Turkish immigrants' preferences

Patients travel to Turkey from:

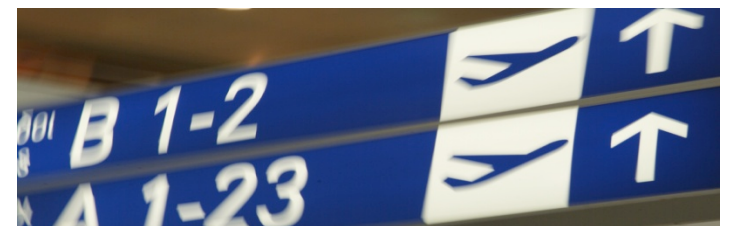
- Middle Eastern countries
- Holland, Belgium, UK, Germany
- Azerbaijan, Georgia, Kazakhstan, Iraq, Iran
- Sudan, Egypt

International affiliations include:

- Harvard Medical International
- Johns Hopkins Medicine
- Memorial Sloan Kettering
- Methodist

Why Turkey?

- Growing interest of foreign direct investment in the country
- Improvements in standards for EU accession
- Private sector growth in healthcare
- Accessibility
 - Over 300 international flights daily
 - US citizens granted one- month visa issued at the port of entry



Why Turkey?

- Cultural and touristic destination
 - Istanbul: 2010 European Capital of Culture
- Commitment to quality and outcomes
- Comprehensive service
- Highly qualified healthcare professionals
- Competitive pricing
- International exposure
 - Substantial experience with expatriate insurance and assistance companies and claims processes

Comprehensive Service

- 3 Tesla intraoperative MRI, PET-CT
- Gamma Knife, Cyber Knife, IGRT
- Congenital Cardiovascular Surgery
- Level III Intensive Care Units
- Assisted Reproductive Health
- Pediatric Sub-specialties
- Telepathology and Genetic Testing
- Transplantation
- Reconstructive and Micro-Surgery



Healthcare resources: Turkey and other medical tourism destinations

<i>World Health Statistics 2008, WHO</i>	MDs/ 10,000	RNs/ 10,000	Dentists/ 10,000	Beds/ 10,000
Brazil	12	38	11	26
Costa Rica	13	9	5	13
India	6	13	<1	n/a
Malaysia	7	18	<1	19
Mexico	20	9	8	10
Singapore	15	45	3	32
<i>TURKEY</i>	16	29	3	27
Thailand	4	28	2	n/a
South Africa	8	41	1	28

Comparative cost for select procedures

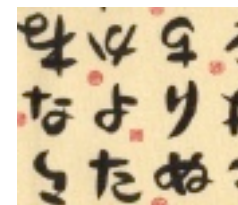
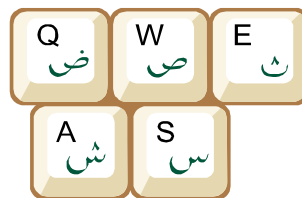
	Turkey	USA/ Retail	USA/ Insurance	India	Thailand	Singapore
CABG	\$12.500	\$210,000	\$94,000	\$10,000	\$11,000	\$30,000
Angioplasty	\$3.300	\$98,000	\$44,000	\$11,000	\$13,000	\$13,000
Total Hip Replacement	\$20.000	\$75,000	\$31,000	\$9,000	\$12,000	\$12,000
Total Knee Replacement	\$17.000	\$70,000	\$30,000	\$8,500	\$10,000	\$13,000
Mastectomy	\$12,000	\$41,000	\$17,000	\$7,500	\$9,000	\$12,400

Services provided to international patients

- Scheduling of medical appointments with follow-up care (*pre-op and post-op evaluation*)
- Assistance with hospital admission and discharges
- Arrangement of accommodation and airport transfer
- Assistance with payment procedures and financial transactions
- Assistance with local tours and excursion arrangements
- Assistance with visa procedures
- Guidance for patient and family before and after arrival
- Assistance with international insurances
- Translation/interpretation

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К Л М Н О П Р С Т
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(Uppercase alphabet)

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DEIK-TAIK Health Commitee

- TAIK-Turkish American Business Council aims to develop business and investment relations between Turkey and US
- Under this overall goal, the ***TAIK Health Committee*** (2006) has decided to focus on facilitating medical travel between the two countries and increasing the brand name recognition of Turkish providers in the US
- In 2008, the Health Committee was renamed as DEIK/TAIK Health Committee expanding its scope to countries beyond the US

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Thank you!

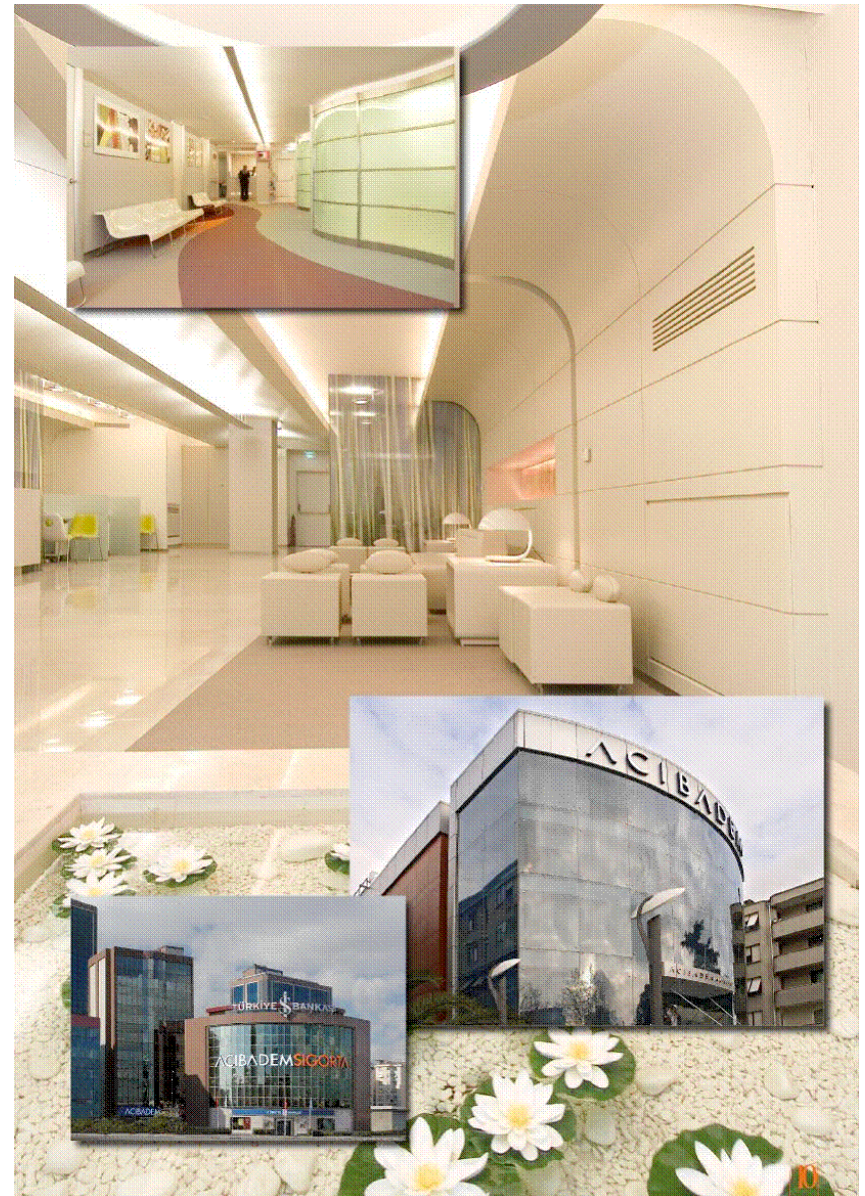




Λ C I B Λ D E M

Acibadem Healthcare Group

- Largest private provider in Turkey
 - 10% outpatient, 13% inpatient market share
- Network of 24 facilities
 - 9 hospitals, 15 outpatient clinics
- Integrated system: hospitals, insurance, central laboratory, project management, university, support services



Acibadem Healthcare Group

- Fortune 500: 161st largest company, largest in service sector and 34th largest employer
- First healthcare provider in Turkey to open a satellite clinic
- First Call-Center in healthcare
- The only publicly traded healthcare provider
- Acibadem University starting classes in Fall '09
- The only healthcare provider to own an health insurance company
- GNP standard Stem Cell Laboratories
- Partnership with Abraaj Capital to expand services in MENASA

ACIBADEM SIGORTA

PLUS

ACIBADEM
LABMED

ACIBADEM HEALTHCARE GROUP	2008 DATA
# of Physicians	1,350
# of Staff	7,000
# of Beds	717
# of Operating Rooms	36
# of Outpatients	1,374,000
# of Inpatients	53,000
# of Surgical Cases	43,000
# of Open Heart Cases	2,093
# of Hip Replacement Cases	157



Quality- PHMI affiliation

- PHMI: Established by Harvard Medical School in 1994
- Acibadem was affiliated with HMI between 2003-2008
- Access to 18 teaching hospitals and institutions and 9,000+ faculty

Professional development of medical staff	15 medical programs (e.g. Movement disorders, women's health, infectious diseases) with 2,057 physician participants
Nursing leadership and education	23 programs (e.g. Leadership, evidence based nursing, oncology/epilepsy/stroke specialty nursing)
Support in development and improvement of internal processes	<ul style="list-style-type: none">•HR performance management system development•Disaster preparedness•Quality consulting and mock surveys•Administrative observerships
Evidence-based medicine	Stroke and oncology treatment guidelines

International patient experience

Patients from 29 different countries, traveling for 65 different sub-specialties



What our patients have said



Marina Taranenko , Kazakistan

We have found all the staff very professional, helpful and courteous. We have very great faith in the treatment being given and the high standards we see at every visit. Thank you.

Akkelien Brinkman , Holland

Acibadem is a very nice, modern hospital. The doctors in this hospital are really professional and the people in general are very helpful. I will advise other people in Holland for **IVF treatment** in the Acibadem Hospitals. I would also like to thank the **Acibadem International patient center** for their wonderful organisation and hospitality, making me feel comfortable during my stay.



Huda Al-Lawati , U.A.E.

Acibadem international center was extremely helpful and arranged an appointment quickly. Dr.Cüneyt was very helpful and clear. He tried his best to understand and gives advices. The payment process is very quick. Acibadem Kozyatağı staff helped me a lot. And they had also been given background about my visit beforehand.