

## **THE DEVELOPMENT OF MEDICAL TOURISM IN SOUTH KOREA AND TURKEY: THE COMPARISON OF ECONOMIC MODELS**

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**Abstract:** The development of medical tourism has become a significant economic and social phenomenon in the last two decades, and the Republic of Korea and Turkey represent two distinct models of success in this field. The purpose of the study is to compare those two economies, focusing on the institutional strategies and economic mechanisms that have contributed to strengthening their position in the global medical tourism market. The research is based on a comparative approach, using documentary analysis, official statistical data and international reports on patient flows, investments and impact on gross domestic product. The results highlight that, while the Republic of Korea relies on technological innovation, high-quality medical services and digitalization, Turkey has developed a competitive model based on low costs, extensive infrastructure and regional accessibility. Both countries have managed to attract international patients through favorable government policies and massive investments in the medical sector, but the differences in strategy highlight the multidimensional nature of medical tourism. The research conclusions emphasize that the experience of South Korea and Turkey provides valuable examples of good practices in the development of medical tourism, using different but effective economic models. For the Republic of Moldova and Romania, these results can serve as a benchmark in the development of national policies aimed at diversifying medical services, improving infrastructure and promoting regional competitiveness. Integrating the positive elements of the South Korean and Turkish models could contribute to capitalizing on the existing potential and positioning these countries on the international medical tourism map.

**Keywords:** medical tourism, Republic of Korea, Turkey, economic models, competitiveness, development.

**JEL Classification:** I15, I18, F2, L83, O5, P52

### **INTRODUCTION**

Medical tourism has emerged over the last two decades as a complex phenomenon, at the intersection of health, economy and international mobility. Beyond its social dimension, this form of tourism represents an important segment of international trade in services, generating substantial investments and significant contributions to the gross domestic product of some countries. The Republic of Korea and Turkey represent two distinct models of success, illustrating different ways of responding to the growing demand for international medical services. The current context of globalization, characterized by increased patient mobility, diversified demand for high-quality treatments and cost differences between medical systems, favors the development of distinct economic models. In this context, the experiences of South Korea and Turkey illustrate two complementary directions of development.

The role of public policies and massive investments in the medical sector is essential for both states. Visa facilitation programs, international accreditations and promotional campaigns have contributed decisively to the positioning of the two countries in the global medical tourism market (Pirzada, 2022; Korea.net, 2025). At the same time, strategic differences emphasize the multidimensional nature of medical tourism and the relevance of adapting economic models to the national context.

The relevance of this research goes beyond the strict framework of the two analyzed states, while also providing benchmarks for other developing countries. For the Republic of Moldova and Romania, adapting the successful elements of the South Korean and Turkish models could constitute a solid basis for diversifying medical services, improving infrastructure and strengthening regional competitiveness in the field of medical tourism.

*The purpose* of this paper is to highlight and formulate the conceptual economic models of the Republic of Korea and Turkey for medical tourism and to carry out a comparative analysis of them, highlighting the common elements and structural differences that have allowed these states to assert themselves on the international medical services market. Through this comparison, the specific and essential features of each state are highlighted, which have determined the competitive advantages of each in the global medical tourism market. In addition, the analysis examines the role of public policies and government investments, which have functioned as accelerators of the development of medical tourism in both countries. The purpose of the paper is not limited to identifying the targeted conceptual economic models, but extends to developing recommendations on the adaptation and transfer of good practices for the Republic of Moldova and Romania, in order to diversify medical services, capitalize on existing potential and increase regional competitiveness. In the future, these measures could contribute to the integration of the Republic of Moldova and Romania on the international map of medical tourism and to the transformation of this sector into a pillar of economic and social development.

#### **METHODOLOGY AND CONCEPTUALIZATION**

To achieve the proposed goal, the research is based on a complex methodology. First of all, it involves the application of *conceptual modeling* that works in two methodological directions:

✓ *inductive conceptual modeling* that implies the generalization of the studied specialized literature, statistical data, facts etc, and revealing the essential features, which constitute the pillars for the country’s conceptual model, reflecting the competitive advantages of the investigated countries in the global economy;

✓ *deductive conceptual modeling* that moves from the formulated conceptual economic models of the Republic of Korea and Turkey towards the recommendations for the Republic of Moldova and Romania.

As an outcome, the conceptual economic model is conceptualized as follows:

**Conceptual Economic Model** refers to the foundations that constitute the pillars of a country’s competitive advantage in a certain industry.

Those foundations are determined by the specific combination of essential factors, among which, if applied to the medical tourism, are:

- The favorable governmental strategy
- The investment in medical and touristic infrastructure
- The degree of digitalization and implementation of innovations
- The service-accessibility and cost-competitiveness

Secondly, comparative and interdisciplinary methodology is used, combining economic analysis with that of public health policies. The study is structured in several steps within those two aforementioned methodological directions:

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1. *Documentary analysis* – academic sources, international reports (e.g. WHO, OECD, UNWTO), specialized studies regarding medical tourism in the Republic of Korea and Turkey were consulted. This step allowed for the theoretical and contextual substantiation of the research.

2. *Statistical analysis* – official data from national sources (e.g. Turkish Statistical Institute, KOSIS – Korea Statistical Information Service) were used, as well as international databases (e.g. UN Comtrade, Intracen, OECD). Those data focused on patient flows, investments in medical infrastructure and the impact of medical tourism on gross domestic product.

3. *Qualitative analysis* – aimed at identifying institutional strategies and government policies that supported the development of medical tourism in the two countries, with an emphasis on the role of innovation, digitalization and fiscal or legislative facilities.

4. *Comparative analysis* – by comparing economic indicators and strategies, the similarities and differences between two conceptual economic models were highlighted.

5. *Interpretation of results* – the data and observations collected were synthesized to provide a clear picture of how the Republic of Korea and Turkey managed to establish themselves as competitive medical tourism destinations, as well as on the lessons applicable in other national contexts, especially in the Republic of Moldova and Romania.

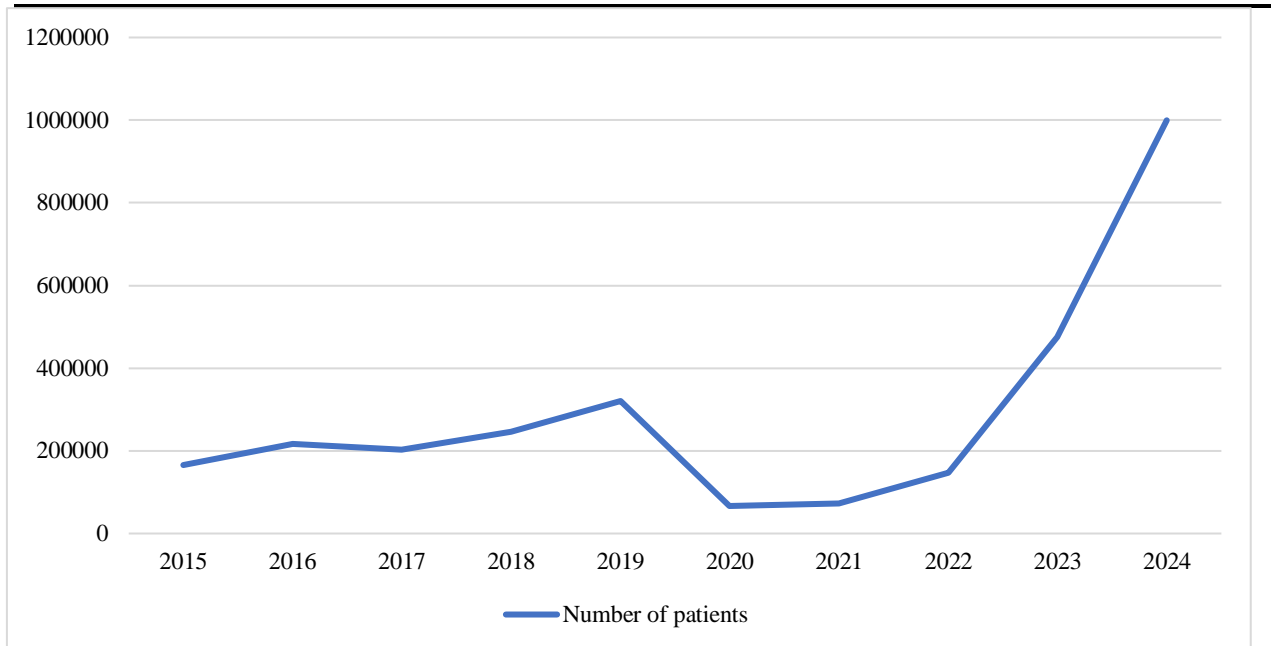
The *hypothesis* underlying this paper is that the development of medical tourism depends on the well-thought conceptual economic model that is based on the combination of essential factors such as favorable public policies, investments in medical and tourism infrastructure, the level of digitalization and innovation, as well as accessibility and cost competitiveness. It is assumed that success on the international market is not determined by a single element, but by a set of economic and institutional measures that, applied coherently, can generate sustainable growth and attractiveness for international patients.

#### **RESEARCH FINDINGS**

As it has been mentioned above, the hypothesis of this research starts from the premise that the development of medical tourism is determined by economic, institutional and social factors, integrated within coherent national policies. To test it, the conceptual modeling and comparison of the current situation in the Republic of Korea and Turkey related to medical tourism have been undertaken based on the analysis of concrete measures implemented by the two states.

South Korea has managed to become a pole of attraction for international patients by focusing on quality and innovation. The state has massively supported the digitalization of the medical system by developing electronic medical records and telemedicine platforms, which has facilitated foreign patients' access to remote medical consultations and services (Kim, 2023). In addition, the Korean government has launched dedicated programs for international patients, including multilingual information centers and helplines, thus strengthening their trust in the South Korean healthcare system. Another concrete step was the investment in international accreditations. Currently, the Republic of Korea has dozens of JCI (Joint Commission International) accredited hospitals, confirming compliance with the highest global quality standards (Kim, 2019). These institutions offer cutting-edge treatments in oncology, cardiology, plastic surgery, using robotics, and thus helping to attract a segment of high-income patients interested in premium services. As a result, in 2024, South Korea attracted approximately 1.17 million foreign patients from 202 countries, a record number supported by both the Ministry of Health's promotional campaigns and the country's high-level medical infrastructure (mohw.go.kr, 2025). Approximately 85% of patients received treatment at medical centers in Seoul (see figure 1).

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**Figure 1. Evolution of foreign medical tourists in Seoul (2015-2024)**

Source: compiled by the authors, english.seoul.go.kr (2025)

The data presented in the figure 1 highlights the evolution of the number of international medical tourists in Seoul during the period 2015–2024. A steady upward trend is observed between 2015 and 2019, with a significant increase from 165,689 patients in 2015 to 320,284 patients in 2019. The trend was conditioned by the accent of the country put on quality of medical services.

The period 2020–2021 saw a dramatic decline, caused by the restrictions imposed due to the COVID-19 pandemic, when the number of patients decreased to 66,507 in 2020 and 72,525 in 2021. However, starting with 2022, Seoul's medical tourism market experienced a rapid recovery, reaching 146,310 patients in 2022 and 473,340 patients in 2023. The recovery and growth were determined by the aforementioned digitalization of the medical system, on the one hand, and the specialized government programs and international accreditation, on the other hand.

The most spectacular increase occurred in 2024, when the number of international medical tourists reached almost 1 million (999,642), representing an absolute record for the capital of South Korea. The income generated by international patients in Seoul was approximately ₩1.2 trillion (around US\$923 million). At the country level, the total medical expenses by international patients was approximately ₩1.4 trillion (about US\$1.08 billion). This evolution confirms the effectiveness of South Korean public policies, investments in medical infrastructure and international promotion strategies, strengthening Seoul's position as a competitive destination in the global medical tourism market.

In Table 1, there is an evolution of the inbound flows of medical tourism in Seoul, by country of origin. For the period 2020–2024, the data attests a spectacular increase in the number of international patients for all 10 countries of the top of the list, which constituted 90,4 % from total inbound flows in Seoul. Japan and China are the main suppliers of international patients to South Korea, in general, and in Seoul, in particular. In 2024, Japan registered 421,541 patients and China 220,260 patients, together representing over 60% of the total. The same East Asia region Taiwan and Mongolia belong to, having together the flux of 92 892 patients, and adding 9,3 % to the regional flux. This reflects the geographical proximity, economic and cultural ties, but also the direct air connectivity between these countries and South Korea.

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**Table 1. The Evolution of International Medical Tourists in Seoul (2020–2024), by country of origin**

No.	Country	2020	2021	2022	2023	2024
<b>Total patients</b>		66507	72575	146310	473340	999642
<b>1</b>	Japan	13138	2446	19440	182166	421541
<b>2</b>	China	18926	15050	24196	82510	220260
<b>3</b>	USA	7323	14742	25123	51777	75531
<b>4</b>	Taiwan	395	378	1132	12157	74292
<b>5</b>	Tailand	3886	3918	15842	24714	31223
<b>6</b>	Singapore	321	423	3319	13074	25977
<b>7</b>	Mongolia	3562	5957	9780	15727	18600
<b>8</b>	Canada	850	1788	3861	8167	13451
<b>9</b>	Australia	442	500	1965	6025	13073
<b>10</b>	Indonesia	346	611	1870	5464	9261
<b>11</b>	Other	17318	26762	39782	71569	96433

Source: compiled by the authors, english.seoul.go.kr (2025)

Another significant group of patients comes from the United States (75,531 patients), and the constant rapid growth is observed in Canada, reaching 13,451 patients in 2024. It means the expansion of South Korea's base of attraction beyond East Asia, including American markets, where the costs of medical procedures are much higher, and demonstrating the interest of patients from developed countries in high-quality Korean services.

It is observed even more regional variety of the countries of origin: Southeast Asia and Oceania, which include Thailand (31,223 patients), Singapore (25,977), Australia (13,073), and Indonesia (9261). They also contributed to the diversification of medical tourism, confirming South Korea's regional attractiveness,

The “Other” category included patients from multiple countries and reached 96,433 patients in 2024 (9,7 % of the total). It proves the expansion of South Korean medical tourism to various markets in Europe, the Middle East and Africa, but also demonstrates the regional potential as it has been rapidly growing.

The main treatment areas in South Korea are: dermatology, plastic surgery, general surgery, ophthalmology, dentistry, internal medicine (integrated), traditional medicine, etc.

In the Republic of Korea, medical tourism is coordinated by the MOHW (Ministry of Health and Welfare) and KHIDI (Korea Health Industry Development Institute), a government agency responsible for the promotion and development of the health industry. Under the auspices of the Medical Korea project, programs to promote medical services, information centers for foreign patients, emergency assistance services, as well as complaint resolution mechanisms have been launched. At the same time, KHIDI runs international training programs and know-how exchange, strengthening Korea's reputation as a regional and global medical hub (Kim, 2023).

The results are visible. As it has been mentioned above, South Korea reported 1.17 million international patients in 2024, a historic record (Korea.net, 2024). This success is supported by complementary policies, such as visa simplification, continued investments in digitalization and the development of telemedicine, as well as international partnerships, such as the KHIDI–HIMSS (Healthcare Information and Management System Society) agreement to assess the digital maturity of Korean hospitals. All of this confirms the *South Korean model based on quality, technology and innovation*.

Turkey has developed a different *model, based on accessibility, competitive costs and extensive infrastructure*. Through massive investments in public and private hospitals, as well as the development of city hospitals, Turkey has managed to significantly increase its capacity to treat international patients (Yılmaz & Aktaş, 2021). A concrete example is the implementation of

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medical air corridors, starting in 2012, which provided direct connections for patients from Europe, the Middle East and North Africa. This measure has reduced travel time and costs, transforming Turkey into an accessible destination for medical treatments. In parallel, the government has introduced standardized medical service packages, which include intervention, accommodation and transportation, strengthening the transparency and attractiveness of the offer (Kılavuz, 2018).

The central element of Turkish policies is the “City Hospitals” program, implemented through public–private partnerships (PPP) since the 2010s. These integrated hospital campuses are built and operated by private consortia, with the state providing long-term financing and guarantees. The goal is to increase treatment capacity, modernize infrastructure, and standardize the quality of medical services. The bright examples are the Adana Integrated Health Campus with 1,550 beds in 6 specialized hospitals, the Bilkent Health Campus in Ankara with over 3,600 beds, and the Etlik Health Campus, all of which were built with state investment (Yılmaz and Aktaş, 2021). The “City Hospitals” program was complemented by solid budgetary measures: in 2024, the Ministry of Health allocated about TRY 83.7 billion (USD 2.02 billion) just for those hospitals, while capital expenditures accounted for almost 20% of the ministry’s budget (OECD, 2024). These investments confirm Turkey's strategy to develop a medical model oriented towards accessibility, volume and relatively low costs, attractive to regional and international patients.

Turkey has become a regional leader in medical tourism, attracting 1.4 million international patients in 2023, and 2 million patients in 2024, especially for general surgery, plastic surgery, ophthalmology, dentistry and transplant services (fineupclinic.com, 2025). The Turkish state has launched global promotional campaigns and offered tax incentives to private investors in the healthcare sector, confirming the decisive role of public policies and competitive costs in supporting medical tourism (Pirzada, 2022).

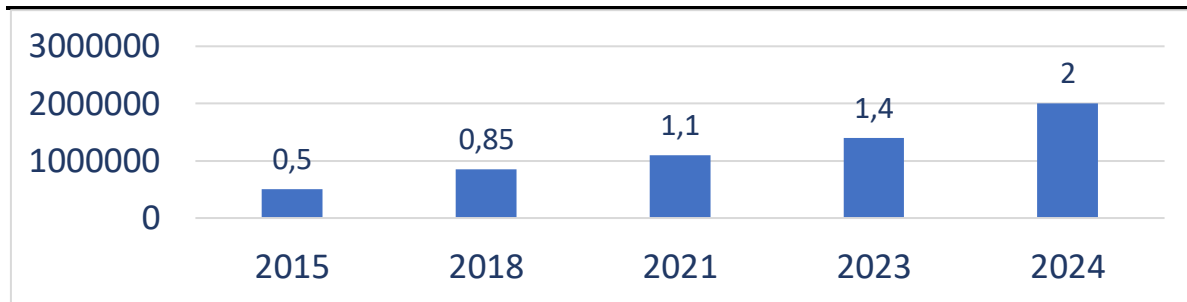
The most important source markets are represented by the countries of the Middle East and Europe, but also by more distant countries, where the high costs of medical services stimulate the migration of patients to Turkey.

The inbound flows by country include:

- Germany – a large community of patients from the Turkish diaspora, as well as European patients attracted by lower costs and the quality of medical services.
- Iraq and Libya – two very important markets for Turkish medical tourism, generated by geographical proximity and the limitations of local medical systems.
  - Azerbaijan and other Caucasus countries – benefiting from cultural and economic ties with Turkey, these countries send thousands of patients annually for surgical interventions and specialized treatments.
  - Russia and the CIS countries – patients attracted by oncological treatments, in vitro fertilization services and cosmetic surgery, where Turkey offers more affordable alternatives than Western Europe.
  - The United Kingdom and other Western European countries – where waiting lists and high costs are causing more and more patients to choose Turkey for dental procedures, hair transplants and cosmetic interventions.
  - States of the Arabian Peninsula (Saudi Arabia, United Arab Emirates, Kuwait, Qatar) – high-income patients, who are attracted by integrated packages (treatment + tourist services), but also by the modern infrastructure of Turkish hospitals.

This diversity of source countries confirms that Turkey combines geographical and cultural advantage with effective marketing strategies and supportive government policies, becoming a regional and international medical hub (tuik.gov.tr, 2025).

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**Figure 2. Number of international patients in Turkey, 2015-2024, mln**

Source: Created by authors based on OECD and Turkstat, 2025

Figure 2 illustrates the significant increase in the number of international patients choosing Turkey as a destination for medical treatment over a nine-year period. In 2015, Turkey registered approximately 500,000 international patients, marking the beginning of an accelerated development phase of medical tourism. Thanks to the state’s massive investments in hospital infrastructure, especially through the *City Hospitals* program, and international promotional campaigns, the number of patients has steadily increased: in 2018 it reached 850,000, and in 2021 it reached 1.1 million people. After the pandemic period, Turkey managed a rapid recovery, reaching 1.4 million international patients in 2023. The sharp increase in 2024, when a record of 2 million patients was registered, confirms the consolidation of Turkey’s position in the field of medical tourism.

This positive development is the result of a combination of several factors:

- implementation of a favorable government strategy, with support for investments in modern hospitals and integrated medical service packages;
- advantageous fiscal policies and public-private partnerships to attract patients from Europe, the Middle East and Central Asia;
- intensive international promotion of the “Health Türkiye” brand and development of complementary tourism infrastructure;
- competitive cost-quality ratio, which allows patients to access advanced medical services at reduced prices compared to Western countries.

At the same time, data provided by the OECD on medical infrastructure expenditures, measured as a percentage of GDP, show significant differences between the Republic of Korea and Turkey over the period 2015–2024 (see Table 2).

**Table 2. Government Investment in Healthcare Infrastructure (% of GDP)**

Period	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>Government Investment in Healthcare Infrastructure: Total</b>										
<b>Republic of Korea</b>	3,6	3,7	3,9	4,1	4,5	4,8	5,2	5,6	5,1	5,0
<b>Turkey</b>	3,2	3,4	3,2	3,2	3,4	3,6	3,6	2,8	3,2	3,7
<b>Government Investment in Healthcare Infrastructure: Hospitals</b>										
<b>Republic of Korea</b>	1,7	1,8	1,9	2,0	2,2	2,3	2,4	2,5	2,2	2,8
<b>Turkey</b>	1,8	1,9	1,8	1,7	1,8	2,0	2,0	1,6	2,0	-

Source: done by the authors based on OECD (2025)

In the case of South Korea, public spending on health infrastructure (all healthcare facilities) has increased steadily, from 3.6% of GDP in 2015 to a peak of 5.6% in 2022, remaining at the level of 5% in 2024. The trend confirms the government’s focus on continuous investment in quality, digitalization and modernization, reinforcing the South Korean model based on innovation and highly complex healthcare services. At the hospital level, spending rose from 1.7% in 2015 to

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2.5% in 2022, and reaching peak of 2,8 % in 2024. This pace shows that hospitals represent a strategic core of investment policy.

For Turkey, the values are lower, but show an interesting dynamic. Total healthcare spending has ranged between 3.2% and 3.7% of GDP, with a slight increase in recent years (2020–2024). At the hospital level, the share has been relatively constant, oscillating between 1.6% and 2.0%, reflecting the emphasis on the development of city hospitals through public–private partnerships (PPP), but also maintaining a competitive price–quality ratio.

The development of medical tourism in Turkey and the Republic of Korea is explained not only by market dynamics, but also by the strategic intervention of the state, which has implemented institutional programs and major investments in health infrastructure.

South Korea has consolidated its position by investing in technological innovation, digitalization and high-quality medical services, which has led to an increase in average income per patient and the attraction of a segment interested in complex procedures (Kim, 2019; Kim, 2023). In contrast, Turkey has developed a competitive model based on low costs, extensive infrastructure and regional accessibility, managing to attract a significant volume of patients from the Eastern Europe, Middle East and North Africa region (Yılmaz & Aktaş, 2021; Kılavuz, 2018).

Both countries have developed complementary strategies, finding their niche at the global market of medical tourism. Turkey continues to expand PPPs and develop centers of excellence (including in advanced therapies, such as cellular and genetic), with a direct impact on international attractiveness (Pirzada, 2022). The Republic of Korea is constantly investing in biomedical R&D, digital infrastructure, and international promotional campaigns under the "Medical Korea" brand to attract patients seeking highly complex medical services.

### **Conclusions**

The research confirms the hypothesis from which it started: the development of medical tourism is the result of the elaboration and implementation of a well-thought conceptual economic model that leans on the interaction between public policies, strategic investments and economic mechanisms adapted to the national context. The comparative analysis of the conceptual economic models for the development of medical tourism in the Republic of Korea and Turkey confirms that success in this area can be achieved through different, but complementary strategies.

In the case of the *Republic of Korea*, the fundamental ideas of its conceptual economic model are:

- orientation towards innovation and digitalization in the medical sector;
- continuous investments in medical infrastructure as well as the field research and development;
- promotion of quality through international accreditations (JCI);
- attracting patients through medical services of high complexity and added value.

In the case of *Turkey*, its conceptual economic model is based on:

- low costs and favorable price-quality ratio;
- development of an extensive medical and tourist infrastructure;
- emphasis on regional accessibility and the creation of medical air corridors, and integration of treatments with complementary services (accommodation, transport, tourism).

The research results also demonstrate that both models respond to global demand: the Republic of Korea covers the need of patients seeking highly complex and safe treatments, while Turkey offers affordable solutions for price-sensitive patients who are looking for quality services comparable to Western standards. Respectively, medical tourism can be viewed as a *multidimensional phenomenon*, capable of adopting different but equally effective models, and reaching success through variety of approaches, adapted to the resources and priorities of each state.

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The comparative analysis of the South Korean and Turkish conceptual economic models also allow to develop the idea in such a way that both the *Republic of Moldova and Romania* can capitalize on the lessons learned from these experiences, and develop a competitive medical tourism sector. In both cases, adapting good practices to the national context could transform the medical system into a pillar of economic growth, service diversification and regional integration.

For the Republic of Moldova, it can be recommended to put emphasis on investments in quality and digitalization, inspired by the South Korean model. The creation of centers of excellence in rehabilitation, cardiology or minimally invasive surgery, the introduction of electronic medical records and supporting hospitals in the international accreditation process would strengthen the confidence of international patients. In parallel, the elements of the Turkish model – integrated medical packages and competitive costs – could be leveraged to attract patients from neighboring countries, especially Romania, Ukraine and the Caucasus.

Romania, with a more developed medical infrastructure than the Republic of Moldova, can follow a path of consolidation by modernizing and diversifying services. The development of regional medical hubs, the integration of treatments with spa and wellness tourism, as well as active promotion on foreign markets could place Romania in a position of regional leadership. Public support policies and promotional campaigns should emphasize both the quality of human resources and the comparative advantages related to costs and geographical proximity.

Both the Republic of Moldova and Romania can benefit from the involvement of the diaspora in promoting medical services in Europe and from public-private partnerships to attract investment. Diversifying services, from complex treatments to check-ups and prophylactic procedures, would contribute to strengthening their position on the international map of medical tourism.

Therefore, combining the elements of innovation and digitalization from the South Korean model with those of accessibility and extensive infrastructure from the Turkish model, will help build *hybrid conceptual economic models*, adapted to the realities of the Republic of Moldova and Romania. These could transform medical tourism into a strategic sector, with a significant impact on the economic development and international image of these two states.

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