

МІНІСТЕРСТВО ОХОРОНИ ЗДОРОВ'Я УКРАЇНИ
ХАРКІВСЬКИЙ НАЦІОНАЛЬНИЙ МЕДИЧНИЙ УНІВЕРСИТЕТ



ГРОМАДСЬКЕ ЗДОРОВ'Я В УКРАЇНІ: ПРОБЛЕМИ ТА СПОСОБИ ЇХ ВИРІШЕННЯ

Томілінські читання

Матеріали VIII науково-практичної конференції
з міжнародною участю

м. Харків, 30 жовтня 2025 року



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**МІНІСТЕРСТВО ОХОРОНИ ЗДОРОВ'Я УКРАЇНИ
Харківський національний медичний університет**

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TRANSFORMATION OF THE PRIVATE MEDICAL SERVICES MARKET IN UKRAINE UNDER CONDITIONS OF A FULL-SCALE INVASION

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The full-scale military aggression of the Russian Federation, which began in February 2022, has caused an unprecedented crisis for the entire healthcare system of Ukraine. The enemy's systematic and deliberate attacks on civilian infrastructure have led to large-scale destruction, which is one of the key challenges. According to the Ministry of Health, in the three years of the full-scale war, 1,984 healthcare facilities were damaged and another 301 were completely destroyed. Considering that at the end of 2021, there were about 3,000 healthcare facilities in the country, the scale of these losses is existential for the industry, disrupting access to medical services, especially in frontline regions.

The scale of the destruction and the critical needs for reconstruction place a colossal financial burden on the state budget. Since the beginning of the invasion, all of Ukraine's internal budgetary resources have been reoriented towards defense needs: about 60 % of the budget is directed to security and defense, while almost 40 % is for social expenditures, including healthcare. Under such priorities, the government is forced to rely heavily on the support of international partners to finance social spheres. The total needs for the recovery and reconstruction of the healthcare sector for the next ten years are estimated at \$19.4 billion, which accounts for 4 % of the total amount needed to rebuild the country. This financial imbalance, where internal resources are extremely limited, changes the logic of industry financing and opens up new opportunities for attracting non-state actors, particularly the private sector.

Before the full-scale invasion, the private medical sector in Ukraine was a dynamic but peripheral player. Its business model was mainly based on providing paid services to patients with middle and high incomes, and the concentration of facilities was observed in large cities. The war has fundamentally changed the market conditions, which necessitates a comprehensive analysis. This report aims to analyze the key

transformations that have occurred in the private medical services market in Ukraine based on the analysis of official reports, media publications, and scientific materials. The main focus will be on changes in business models, labor market challenges, the emergence of new market opportunities, and the role of public-private partnerships.

With the start of the full-scale invasion, the business models of private medical facilities underwent significant changes due to a sharp drop in solvent demand. A significant number of potential clients, who formed the basis of commercial clinics' revenue, were forced to evacuate within the country or abroad, which led to significant financial losses. In these conditions, medical networks were forced to quickly adapt, changing their operational and financial strategies.

A prime example of such adaptation is the case of the «Dobrobot» medical network. According to publications, with the beginning of the war, the company lost most of its revenue, which forced it to switch from a purely commercial model to a hybrid one that combines commercial and social initiatives. The network began providing free medical services to victims, and the main source of funding for these projects became charitable organizations and international funds. This strategy not only ensured the survival of the business, allowing it to retain its key team, but also strengthened its social role, positioning the company as an important player in the country's recovery. This example demonstrates that in a deep crisis, large private players can use their capacity as social infrastructure, attracting external grant funding and becoming part of the national response system.

Beyond the «Dobrobot» case, other private facilities also integrated elements of social responsibility into their business strategies. For instance, the «Oxford Medical» medical center provides free primary consultations and significant discounts on other services for military personnel and their families. Similarly, other private clinics specializing in rehabilitation offer free sessions for soldiers with severe injuries. These actions are not only a manifestation of social responsibility but also a strategic move. Providing preferential services to military personnel and their families builds a loyal client base that can become the foundation for a stable patient flow after the war. Moreover, in conditions of unstable commercial demand, such social projects ensure minimal clinic occupancy, helping to retain qualified staff.

Unlike large networks, small clinics found themselves in a more vulnerable position. Medical market experts predict that a significant portion of small private facilities will not be able to withstand the financial burden and may close permanently. This situation demonstrates how the crisis acts as a catalyst for market consolidation. Large players, with greater financial and human resources, have proven to be more resilient to the shock and have better opportunities for adaptation, while smaller entities face the risk of complete cessation of operations. It is expected that in the post-war period, this will lead to a decrease in the number of small players and a strengthening of the dominant position of large networks, which may affect competition and pricing policy in the market.

One of the most significant challenges facing the private sector is the outflow of qualified medical personnel. The war provoked internal and external migration of healthcare workers, which exacerbated the pre-existing shortage of specialists. For example, in the «Dobrobot» medical network, more than 10 % of employees who left at the beginning of the invasion have not returned. Similar trends are observed in other facilities. This significant outflow of staff, especially young professionals, creates a long-term «brain drain» and is a potential threat to the post-war recovery of the healthcare system.

The overall shortage of healthcare workers existed even before the war. According to data, in one of the regions, the shortage of specialists is 1,266 doctors. The war has only deepened this problem, as both public and private healthcare facilities are forced to compete for limited resources. This leads to an increase in personnel costs in the private sector and limits the ability to expand the range of services, especially high-tech ones.

The growing demand for certain services, particularly for psychological assistance, has created additional challenges. The full-scale war has sharply increased the need for psychological support, and it is estimated that by the end of the war, approximately 15 million people will require psychological assistance. This growing demand leads to the appearance of unqualified «pseudo-psychologists» on the market. This poses a serious threat to the health and safety of patients, as their services may not only fail to help but may also cause even more harm. This situation highlights the need to improve licensing and certification mechanisms to protect patients and support bona fide private clinics that provide high-quality services in accordance with approved standards.

Despite significant challenges, the war has also opened up new opportunities for the private medical services market, especially in segments related to treating the consequences of combat. There has been a rapid increase in demand for psychological and rehabilitation services. It is estimated that one in five people in the combat zone has a mental disorder, and the prevalence of PTSD in 2023 increased fourfold compared to 2021. This market segment is long-term, which provides private clinics with the prospect of stable income, unlike the unstable commercial demand of peacetime. This makes areas like mental health and rehabilitation an ideal basis for the development of public-private partnerships (PPPs).

In the context of limited state budget, the Government of Ukraine considers PPPs a key mechanism for attracting investment in the reconstruction of medical infrastructure. Attracting private capital allows for the diversification of funding sources and a reduction of the burden on the state budget. Cooperation with international financial organizations, such as the World Bank and the EBRD, is part of this strategy, while the division of roles between the organizations avoids duplication of efforts and ensures the alignment of aid with the country's strategic priorities.

This new model of interaction between the state and the private sector is a significant change. If earlier PPPs in healthcare were more declarative, now they are becoming a practical tool for financing and reconstruction. Efforts are also being made to harmonize Ukrainian PPP concepts with international standards. This is a critical step, as such harmonization increases the trust of foreign investors and international financial organizations, who are willing to act as guarantors and investors in reconstruction projects. This opens the way for attracting billions of dollars in investments needed to rebuild the industry.

The conducted study is based on the analysis of available public sources, such as official reports of state institutions, media publications, and scientific articles. Official sources, including the reports of the National Health Service of Ukraine (NHSU) and the Center for Public Health (CPH), contain generalized information that includes data from private facilities. However, attempts to obtain detailed quantitative indicators, for example, on the dynamics of financial flows in the market, the number of healthcare workers in the private sector, or the volume of services provided, are met with the absence or inaccessibility of this data. For example, when trying to obtain data from CPH reports, access to some files is limited or the information is missing.

This situation creates a significant methodological limitation for conducting a full-fledged quantitative analysis. Our conclusions must be based primarily on qualitative data, expert assessments, and individual business cases. Although media materials and interviews with business representatives provide valuable data illustrating adaptation strategies (e.g., the «Dobrobut» case), these publications are selective, reflect only a part of the situation, and can be subjective, focusing on large market players. This is a key methodological problem that should be considered when formulating conclusions, as the lack of transparent, detailed data hinders the conduct of deep scientific research of the market.

Overall, the private medical services market in Ukraine has gone through a path from a deep crisis to a stage of adaptation and a search for new opportunities. This transformation includes changing business models from purely commercial to hybrid ones with an enhanced social component, integration into the state system through public-private partnership mechanisms, and a shift in priorities to providing services in new, critically important segments, such as psychological and rehabilitation assistance.

The future prospects for the market are encouraging, but they are accompanied by significant risks. On the one hand, the market is expected to grow due to the long-term demand for rehabilitation and mental health services. The development of public-private partnerships and the harmonization of standards with international requirements open the way for attracting international investments, which will strengthen the role of the private sector in the country's recovery. On the other hand, the long-term shortage of qualified personnel, unfair competition from unregulated players, and dependence on external funding pose significant risks to the sustainable development of the industry.

For further scientific analysis and effective market management, it is necessary to overcome the existing data gaps. It is recommended to create transparent and accessible databases for market monitoring, including detailed financial indicators and data on staff migration. This will allow for a full-fledged quantitative and qualitative analysis of the long-term consequences of the full-scale invasion on the private medical services market, which is a necessary condition for developing an effective state policy in the field of healthcare.

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