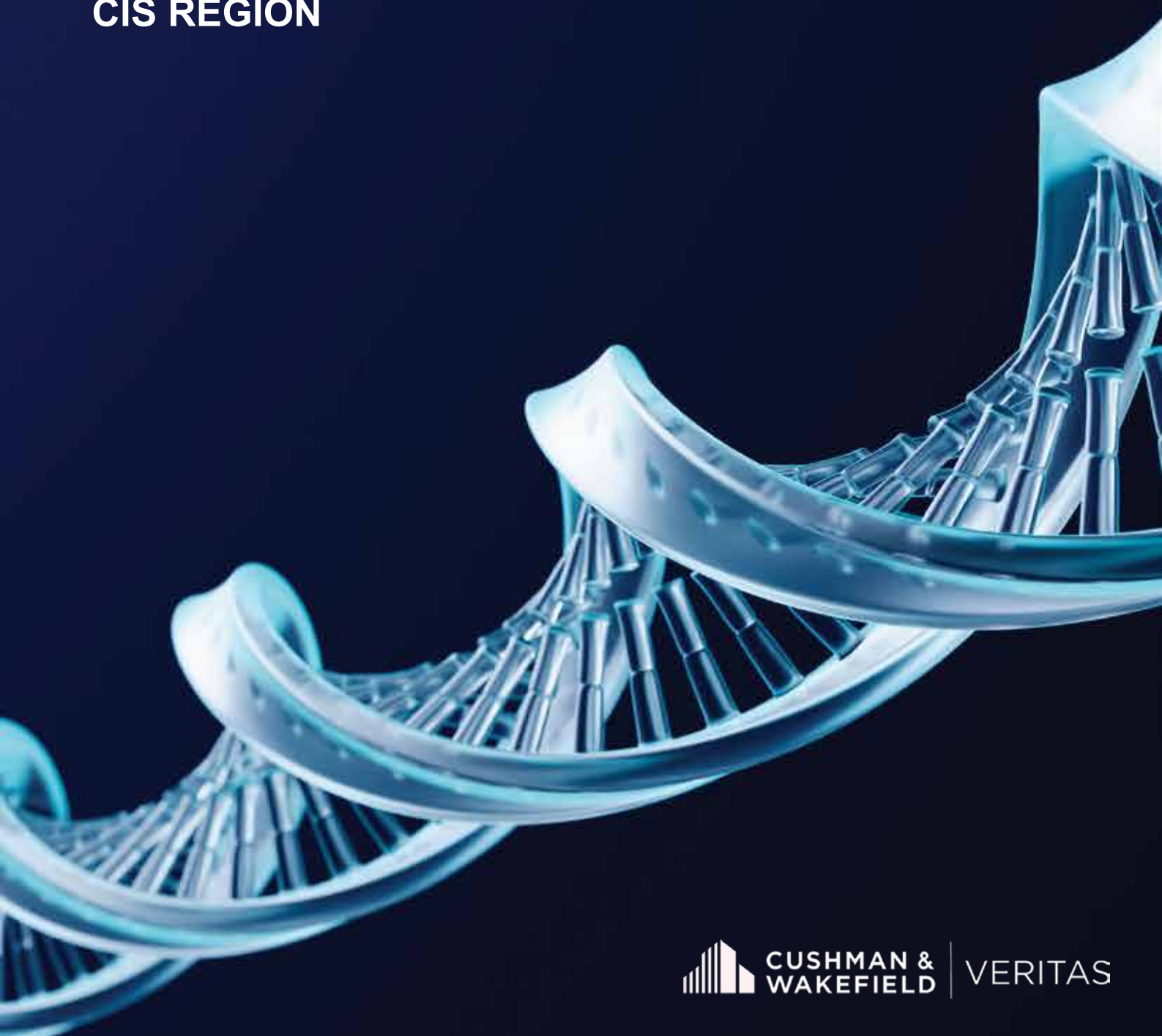


2024

MEDICAL BUILDINGS

CIS REGION



CUSHMAN &
WAKEFIELD

VERITAS

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ALMATY 2024

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Almaty, as the largest city in Kazakhstan, is a key hub for healthcare services, both for its residents and for medical tourists from neighboring regions. The city's healthcare sector has been evolving rapidly, driven by both the increasing demand for services and the presence of modern technologies. With a population of around 2.3 million, Almaty faces a significant need for medical services, particularly among its aging population. Approximately 11% of the city's residents are aged 63 and older, making it crucial to provide specialized healthcare services for the elderly, who require continuous monitoring and care.

The city has become a central point for medical services, not only serving its own population but also attracting patients from other parts of Kazakhstan and neighboring countries. This is due to its advanced medical equipment, modern facilities, and the presence of highly qualified specialists. This trend is also evident in the capital, Astana, which is home to many state-of-the-art medical centers and attracts patients seeking top-tier medical care.

In addition to domestic needs, Kazakhstan has been actively promoting medical tourism as a growing sector of its economy. The country is particularly attractive to patients from neighboring countries, such as Kyrgyzstan, Uzbekistan, and Tajikistan, due to its competitive healthcare prices, modern equipment, and proximity. The government has been investing in healthcare infrastructure and supporting policies to enhance the medical tourism industry.

Despite the presence of advanced technologies and modern hospitals, the city still faces a shortage of high-quality clinics specializing in screening, diagnostics, and preventive care. The increasing demand for these services has led many people to seek medical examinations abroad, traveling to countries such as South Korea, Germany, Turkey, and Israel. This option is often expensive, with the cost of flights alone being a significant financial burden.

ALMATY 2024

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2 258 200
Population of Almaty



11%
Population aged 63 and above



844.2 USD
Average Wage in Almaty

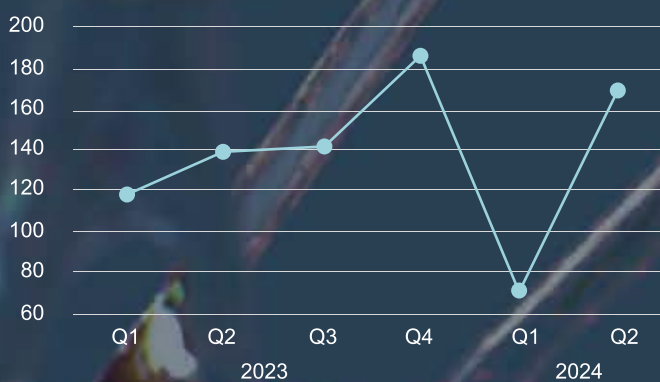


911.1 USD
Average Wage of a Doctor
in Almaty

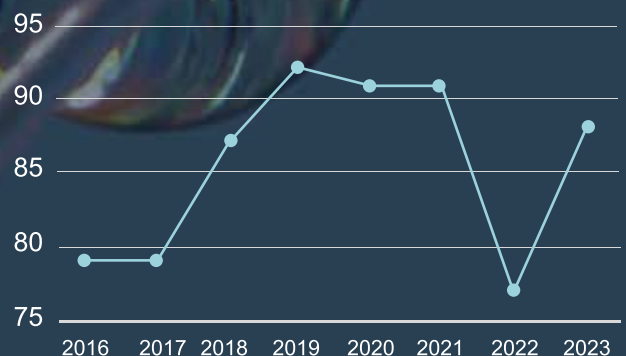


659.5 USD
Average Wage of a
Healthcare Worker in Almaty

COST OF MEDICAL SERVICES IN ALMATY, BILLIONN KZT



NUMBER OF HOSPITAL ORGANIZATIONS IN ALMATY



Source: Bureau of National Statistics Q2 2024

** the numbers are based on the KZT/USD rate of 477.65 provided by the National Bank of the Republic of Kazakhstan as of Q3 2024

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ECONOMIC CONTRIBUTION OF HEALTHCARE

The healthcare sector plays a significant role in Kazakhstan's economy. As of 2024, it contributes approximately 3.4% to the country's GDP. In Almaty, the healthcare services rendered amount to around 354.6 million USD, reflecting the city's substantial investment in health infrastructure.

Cost Breakdown:

- Public Healthcare Services: Approximately 192129.6 thousand USD
- Private Sector: Around 122263.1 thousand USD
- Corporate Healthcare Services: 40213.9 thousand USD

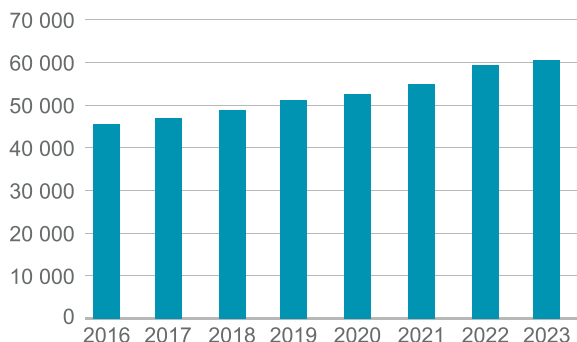
WORKFORCE AND SALARY TRENDS

The healthcare workforce in Almaty consists of approximately 20,000 medical professionals, including doctors, nurses, and administrative staff. Average salaries for key roles are as follows:

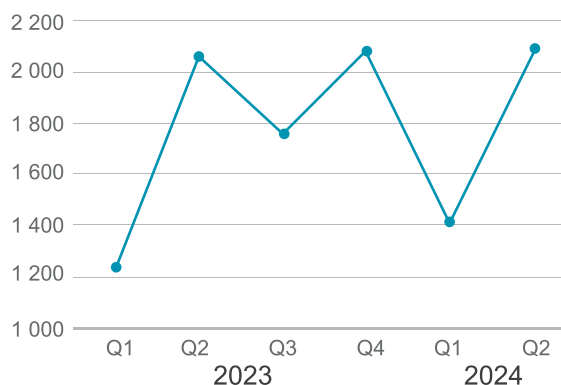
- Doctors: 911.1 USD
- Pharmacists: 796.4 USD
- Nurses: 517.2 USD
- Healthcare Technicians: 508.5 USD

The data indicates a growing demand for healthcare personnel, particularly in response to the aging population and expanding medical facilities.

NUMBER OF RECIPIENTS OF ASSIGNED STATE SOCIAL BENEFITS IN ALMATY, PEOPLE



SERVICES PROVIDED IN THE FIELD OF SOCIAL SERVICES WITHOUT ACCOMMODATION IN ALMATY, MILLION TENGE



ALMATY 2024

Government Social Assistance

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The introduction of the Mandatory Social Health Insurance (MSHI) system in Kazakhstan on January 1, 2020, has fundamentally changed the structure of healthcare financing in the country. With funding for the healthcare sector increasing by more than 2.5 times, the system plays a critical role in improving the availability and quality of medical services. In 2024, over USD 5.86 billion is allocated to funding healthcare services, with USD 2.51 billion specifically directed to MSHI. This increase has had a significant impact on healthcare accessibility across the country.

HOW THE MSHI SYSTEM WORKS

Under the MSHI system, contributions are made by the state, employers, and citizens. This shared responsibility ensures that every insured person receives essential healthcare, regardless of their financial situation or the level of their contributions. A significant portion of the population is covered, with the state funding contributions for 11 million citizens in 15 benefit-entitled categories, which include vulnerable groups such as pensioners, children, and the unemployed.

Once enrolled, patients can choose from a network of providers covered by the Fund. Private clinics that meet the necessary standards are eligible to participate in this system. The MSHI fund pays medical providers for the services rendered to insured individuals, but only after verifying the quality and scope of the services provided. This means that medical providers must maintain high standards of care to receive payment from the Fund, encouraging continuous improvement in service quality.

HOW MSHI BENEFITS PRIVATE CLINICS

For private clinics, participating in the MSHI system offers several key advantages:

- 1. Increased Patient Flow:** By being part of the MSHI network, private clinics gain access to a large pool of insured patients. This significantly increases their patient flow, as many people are now covered by the MSHI system and can select private healthcare providers.
- 2. Stable Funding:** Through MSHI, private clinics receive regular payments for the services they provide to insured patients. These payments are often more predictable than out-of-pocket payments from individual patients, helping private clinics manage their finances more effectively.
- 3. Enhanced Reputation and Competitiveness:** Participation in MSHI elevates the clinic's standing within the healthcare market. Patients are more likely to choose clinics that are covered under the MSHI system, knowing they can receive a wide range of medical services without the financial burden of out-of-pocket expenses.
- 4. Expansion of Services:** With the increased financial resources provided by MSHI, private clinics can expand their service offerings. They can invest in new medical technologies, upgrade their facilities, and hire additional staff, thus improving the overall quality of healthcare provided.

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Health Insurance



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Private Health Insurance: In addition to MSHI, private health insurance has gained popularity, especially among employers offering it as part of employment benefits. In 2023, the private health insurance market in Kazakhstan reached a gross written premium of approximately 68.01 million USD, with an average spending of 3.43 USD per capita. This indicates a growing awareness and demand for supplementary health coverage.

Government Initiatives: The government plans to involve more than 3.3 million citizens in the social health insurance system by 2025, aiming for a coverage rate of at least 90-95%. This initiative includes measures such as alternative mechanisms for independent contributors and the introduction of imputed medical insurance for migrant workers and students.



ALMATY 2024

New Constructions

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HEALTHCARE FACILITIES

As of 2023, Almaty has a total of 88 healthcare facilities, an increase from 77 in 2018. This trend shows a 14% growth over the last five years, indicating a proactive approach to enhancing healthcare access. The number of hospital beds has also increased, with a total of 13,034 beds currently available, reflecting an ongoing commitment to improving health services.

NEW MEDICAL CONSTRUCTIONS

Almaty is experiencing active development in the healthcare sector, reflected in the construction of new medical centers that meet the needs of the population.

As part of the **National Project "Healthy Nation,"** the construction of 20 new multipurpose hospitals is planned by 2025, with private investments being attracted. In particular, two multipurpose research centers for infectious diseases are set to be built in Almaty and Astana, each with 500 beds.

In Almaty Region, a modern multi-purpose hospital is being planned, based on South Korean technologies and expertise. The project, named **"Shin-Line Hyundai,"** is a collaboration between renowned Kazakh businessman Andrey Shin and Dr. Kim Boo Sop, the head of Hyundai Hospital in South Korea. The hospital will be located in the village of Baysereke, covering **15,000 square meters** with **200 beds**. The project, which is valued at \$72 million, is expected to be completed by 2027 and will focus on treating complex conditions such as cardiology and neurosurgery.

The partnership aims to improve the quality of healthcare in Kazakhstan while also addressing social issues. Over 400 jobs are expected to be created, and the project will have an economic impact of around \$700 million. This hospital will serve as a center for knowledge exchange and training for local specialists, fostering international cooperation between Kazakhstan and South Korea.

Additionally, the construction of 12 polyclinics in Almaty is planned by 2025, indicating a commitment to improving access to medical services for the population.

Thus, Almaty continues to develop its medical infrastructure, attracting both private investments and government funding, with the aim of enhancing the quality and accessibility of healthcare services for its residents.

ALMATY 2024

Sanatoriums

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Kazakhstan is increasingly focusing on its healthcare infrastructure, particularly through the development of sanatoriums and wellness centers. While there is potential for international patients, the primary users of these facilities are residents of Kazakhstan seeking rehabilitation and recovery services.

The use of sanatoriums for health and wellness is prevalent among residents of Kazakhstan. Factors contributing to this trend include:

1. **Quality of Care:** Many Kazakhstan residents choose to visit sanatoriums due to the high quality of care and specialized treatments available compared to other local options.
2. **Affordability:** Services in these facilities are often more affordable than equivalent treatments abroad, making them an attractive option for residents.
3. **Variety of Services:** Sanatoriums offer a wide range of services, including rehabilitation for chronic diseases, post-operative recovery, and general wellness treatments, catering to the needs of local patients.
4. **Rehabilitation for Residents:** Last year, approximately 413,344 patients from Kazakhstan utilized these facilities, reflecting a strong preference for local wellness options among the population.

NOTABLE SANATORIUMS

Some of the prominent sanatoriums in and around Almaty that are favored by local residents include:

- **Sanatorium Alakol:** Renowned for its mineral-rich waters and natural therapeutic methods.
- **Sanatorium Kaskelen:** Offers a variety of health programs, including rehabilitation services.
- **Sanatorium Zhetysu:** Known for its scenic location and specialized health services.
- **Sanatorium Medeu:** Situated near the mountains, it provides a peaceful environment for recovery.
- **Sanatorium Tien Shan:** Focuses on comprehensive health rehabilitation and wellness.

These facilities are popular among local residents, providing essential services that cater to the health and wellness needs of the population.



175 sanatoriums
In Kazakhstan



12 sanatoriums
In Almaty



105 doctors
In sanatorium and resort
organizations in Almaty



280 medical staff
In sanatorium and resort
organizations in Almaty



46 161
Patients (rested
individuals) treated
over the year in Almaty



10 DAYS
Average length of stay

Source: Buero of National Statistic, 2023



TASHKENT 2024

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ECONOMIC CONTRIBUTION OF HEALTHCARE

Uzbekistan's healthcare sector has seen significant growth in terms of both infrastructure and economic output. The Gross Domestic Product (GDP) contribution from healthcare and social services increased from 5.4 billion USD in 2016 to 23.5 billion USD in 2023. This steady rise reflects the expanding role of healthcare in the national economy, with the sector becoming a key pillar of economic growth, driven by increasing demand for healthcare services, medical tourism, and investment in infrastructure.

POPULATION DEMOGRAPHICS

Population Size: Tashkent, the capital of Uzbekistan, has a population of approximately 3,040,800 people as of the most recent data.

Age Structure: The aging population is becoming a key demographic challenge, with 5.6% of the population in Tashkent aged 65 and above. This segment of the population is expected to grow in the coming years, which will increase the demand for healthcare services, particularly those catering to elderly care, chronic diseases, and age-related health issues. This aging trend will likely push the government and private sector to invest more in senior healthcare services and facilities.

VOLUME AND COST OF HEALTHCARE SERVICES

Healthcare Service Volume: The number of people served in healthcare institutions, particularly in sanatorium-resort organizations, grew significantly in recent years. The total number of people served in 2023 reached 887.4 thousand, a recovery from the pandemic-induced drop in 2020. The total number of patients treated in hospitals remained high, with 1.45 million people receiving inpatient care in 2021.

Healthcare Costs: The GDP dedicated to healthcare and social services has increased dramatically, from 5.4 billion USD in 2016 to 23.5 billion USD in 2023. This growth in healthcare expenditure corresponds to investments in infrastructure, healthcare workers, and expanding services. Despite the increase in healthcare expenditure, the cost per service remains relatively moderate compared to global standards, making healthcare services accessible for a large portion of the population.

TASHKENT 2024

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3 040 800*
Population of Tashkent



5,6%
Population aged 65 and above



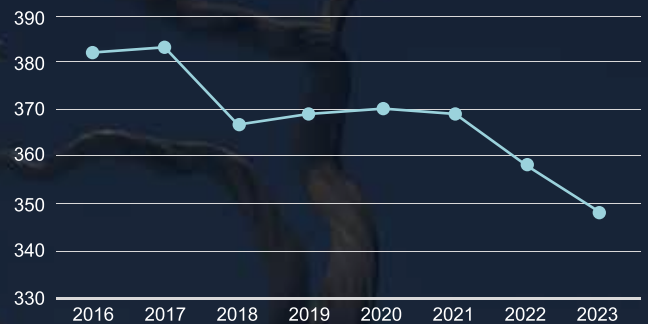
683,8 USD
Average Wage in Tashkent

*data for January 2024



258 USD
Average Wage in Healthcare
and provision of social services

POPULATION PER DOCTOR

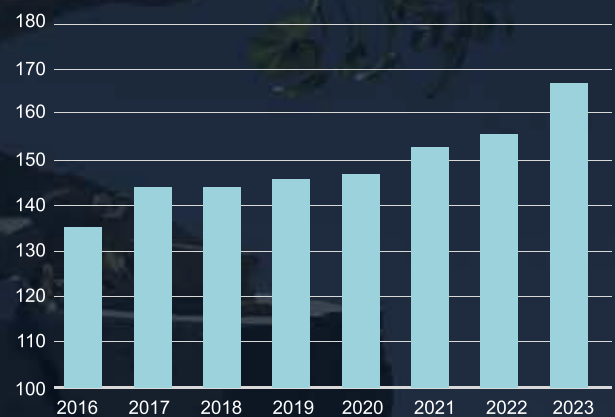


COST OF MEDICAL SERVICES, MILLION USD



Source: Stat.uz Q3 2024

NUMBER OF HOSPITAL ORGANIZATIONS IN TASHKENT



** the numbers are based on the UZS/USD rate of 12 7770 provided by the National Bank of the Republic of Uzbekistan as of Q3 2024

TASHKENT 2024

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HEALTHCARE FACILITIES

- **Hospital Beds:** The number of hospital beds in Tashkent has steadily increased from 77 beds per 10,000 people in 2016 to 85.1 beds per 10,000 people in 2023. This indicates a growing capacity to meet the healthcare needs of a population that is both increasing in size and aging. Additionally, the total number of hospitals in Tashkent grew from 135 in 2016 to 167 in 2023, highlighting an expansion of medical infrastructure to accommodate the growing demand for health services.
- **Healthcare Organizations:** Sanatorium-resort institutions, which are key players in Uzbekistan's medical tourism sector, also saw an increase in number. From 434 such organizations in 2016, the number grew to 591 in 2023, driven in part by an influx of medical tourists seeking treatment in Uzbekistan.

HEALTHCARE WORKFORCE AND SALARY TRENDS

- **Workforce Growth:** The healthcare workforce in Uzbekistan, including doctors and medical professionals, has been gradually increasing. The total number of doctors increased from 19,167 in 2016 to 23,073 in 2023, reflecting the expansion of healthcare services. Additionally, the number of healthcare professionals per 10,000 people remained fairly stable, ensuring that the ratio of healthcare providers to the population stays adequate to meet growing healthcare needs.
- **Salary Trends:** The average salary of healthcare workers in Uzbekistan has been on an upward trajectory, though specific figures on salaries were not provided. The increase in healthcare sector GDP and workforce suggests that salaries for healthcare workers likely rose in response to inflation and increased demand for healthcare professionals. As the healthcare sector continues to expand, salaries for medical workers and administrative staff are expected to increase in line with industry standards and growing healthcare budgets.

HEALTHCARE ACCESSIBILITY

- **Access to Services:** The ratio of people per hospital bed has remained stable at approximately 215 people per hospital bed in 2023, which reflects a reasonable access to inpatient services. Similarly, the number of people per doctor has decreased from 382 in 2016 to 348 in 2023, indicating that the healthcare workforce is becoming more effective at addressing the healthcare needs of the population.

TASHKENT 2024

Medical Tourism

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OVERVIEW AND TRENDS

Uzbekistan has been increasingly positioning itself as a competitive destination for medical tourism in Central Asia. Over recent years, the country has made significant investments in both healthcare infrastructure and international marketing to attract medical tourists. The steady growth in medical tourism reflects the nation's commitment to improving its healthcare sector and leveraging it as an economic driver.


GROWTH OF MEDICAL TOURISM

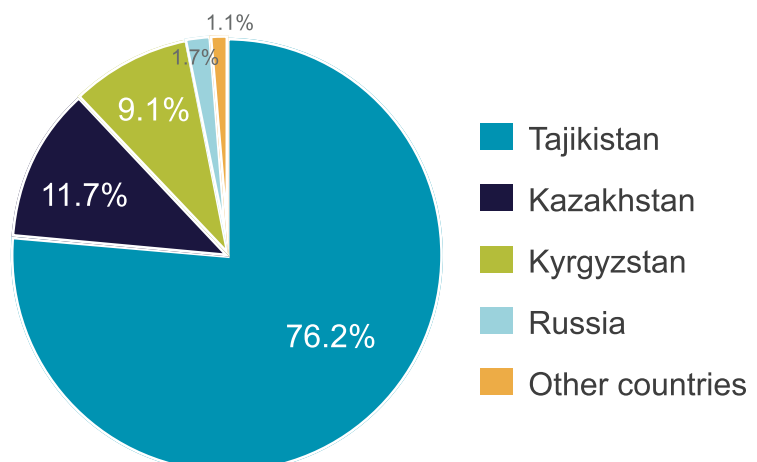
Medical tourism in Uzbekistan has shown impressive growth from 2016 to 2023. In 2016, around 27,100 tourists visited the country for medical purposes, and this number increased steadily, reaching 61,300 in 2023. The pandemic in 2020 had a temporary setback, reducing the number of visitors to 15,000, but there was a rapid recovery in the following years, with 70,000 medical tourists visiting in 2022, and the growth continuing into 2023.

Uzbekistan is increasingly recognized for offering high-quality medical services at a fraction of the cost compared to many Western and regional countries. The rise in medical tourism can be attributed to several factors:

- **Affordable Treatment Costs:** Uzbekistan offers a wide range of medical treatments at competitive prices, especially in areas such as dentistry, dermatology, plastic surgery, and fertility treatments. Patients from neighboring countries, Russia, and even some from Europe and the Middle East visit for medical services due to the affordability and quality of care.
- **Well-Developed Healthcare Infrastructure:** The expansion of healthcare facilities, particularly medical resorts and sanatoriums, has played a key role in attracting medical tourists. Many of these resorts combine medical treatment with relaxation and recovery, offering spa treatments, rehabilitation services, and traditional therapies.

 **61 300**
Tourist visiting for medical purposes

 **25.8%**
Tourist from total inbound tourism come for medical purposes



Source: Stat.uz, 2023

TASHKENT 2024

Sanatoriums


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 **591** sanatoriums
In Uzbekistan

 **57 800**
Number of places in sanatorium
and resort institutions

 **887 400**
Patients treated over
the year in sanatoriums

Source: Stat.uz, 2023

Key attractions include:

Cosmetic and Reconstructive Surgery: Affordable plastic surgeries like facelifts and rhinoplasties.

Dental Care: Modern dental clinics offering cost-effective treatments such as implants and orthodontics.

Traditional Medicine: Unique therapies such as mud baths and herbal treatments in health resorts.

Fertility Treatments: IVF and other services that attract international couples.

Tashkent's proximity to various natural resources, such as the Chimgan Mountains and the Fergana Valley, makes it an ideal location for wellness resorts. Visitors are attracted by the combination of modern medical care, natural healing therapies, and the chance to relax in beautiful, serene environments. Tashkent's well-developed infrastructure also makes it easier for tourists to access these resorts.

The trend toward wellness tourism is growing, driven by a rising interest in stress relief, rehabilitation, and natural health therapies. This trend is particularly appealing to those seeking alternatives to more conventional treatments, especially for chronic conditions, respiratory diseases, and rehabilitation post-surgery.

Notable Sanatoriums Near Tashkent:

- Sanatorium "Chimgan"

Known for its combination of mountain air and wellness treatments, including hydrotherapy, mud therapy, and massages.

- Sanatorium "Beldersay"

Famous for its stunning views, fresh mountain air, and therapeutic services targeting joint problems, stress, and respiratory diseases. It is also popular for recreational activities like hiking and skiing in winter.

- Sanatorium "Samarqand"

Near the historic city of Samarkand, about 270 km from Tashkent. Known for its traditional architecture and peaceful environment attract both local and international visitors.

- Sanatorium "Fergana"

Fergana Valley, approximately 350 km from Tashkent. Popular for its focus on treatments for skin conditions, respiratory issues, and post-operative rehabilitation.

TASHKENT 2024

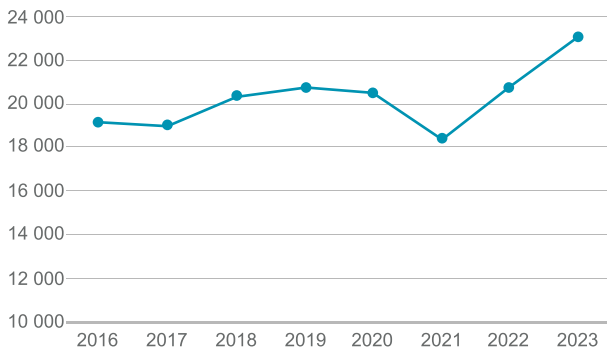
Medical Insurance

01 ALMATY Market Overview

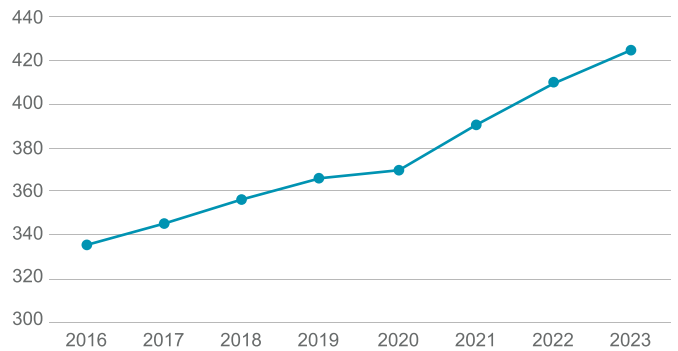
02 TASHKENT Market Overview

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Number of doctors in Tashkent



People receiving pensions and social benefits in Tashkent, thousands people



The rollout of state medical insurance will begin in Tashkent and Sirdarya, and by January 1, 2025, it will extend to Karakalpakstan. The implementation of the system is part of a broader effort to enhance primary healthcare services, as outlined in a presentation to the President of Uzbekistan on September 4, 2024.

To prepare for the system launch, the government will introduce two key digital tools by the end of 2024: the "Electronic Polyclinic" and "Electronic Hospital" systems. Medical staff will be trained to use these systems, and healthcare institutions will be equipped with the necessary technology and network infrastructure.

The new system will apply a results-based financing model, with medical services and medications provided under insurance being funded by the state budget. No additional charges will be imposed on the population for insurance contributions at the initial stage. Instead, tax revenues will be redirected to fund the State Medical Insurance Fund, which will cover medical services and medications as part of a guaranteed package of care.

The reimbursement program, launched in Sirdarya and parts of Tashkent (Yunusabad, Almazar, and Chilonzar districts), covers a list of 11 medications under the guaranteed care package. The program will be expanded to more areas and include additional medications as the system rolls out across the country.

The government has accelerated the transition to a fully state-funded medical insurance system, with plans to complete the rollout by 2026. The State Medical Insurance Fund will be fully integrated into the Ministry of Health starting in 2024 and will operate as an independent fund by 2027.

BISHKEK 2024

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The healthcare system in Bishkek, the capital of the Kyrgyz Republic, plays a key role in the country's socio-economic development.

ECONOMIC CONTRIBUTION OF HEALTHCARE:

Healthcare in Kyrgyzstan contributes around 1% of the Gross Domestic Product (GDP), which is typical for countries with similar income levels. However, government spending on primary healthcare per capita remains one of the lowest in the WHO European Region. In 2024, Kyrgyzstan's Tax Service plans to collect approximately 1 billion soms in Value Added Tax (VAT) on medicines and medical products, which may affect the accessibility of healthcare services for the population.

DEMOGRAPHIC SITUATION:

According to the National Statistical Committee, the life expectancy in Kyrgyzstan is 72.5 years. In Bishkek, this figure is higher, reaching 79.2 years in 2021. In 2021, Bishkek had a population of 1,025,000 people, which accounts for about 15% of the total population of the country.

HEALTHCARE FACILITIES:

Bishkek is home to leading healthcare institutions, such as the National Center of Cardiology and Therapy named after academician M.M. Mirrakhimov, the National Center of Oncology and Hematology, and the Kyrgyz State Medical Academy named after I.K. Akhunbaev, which trains healthcare professionals for the entire country.

WORKFORCE AND SALARY TRENDS:

There are about 15,000 healthcare workers in Bishkek, including doctors, nurses, and technical staff. The average salary of a doctor is around 30,000 soms per month, which is below the national average. In recent years, there has been a shortage of family doctors, particularly in rural areas, which leads to increased workload for specialists in cities. According to the Ministry of Health, Kyrgyzstan faces a shortage of about 5,500 healthcare workers, which also impacts the capital.

Thus, the healthcare system in Bishkek faces a number of challenges, including the need for increased funding, improved quality of medical services, and addressing workforce issues.

BISHKEK 2024

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1 165 500*
Population of Bishkek

**data for January 2024*



4%
Population aged 60 and above

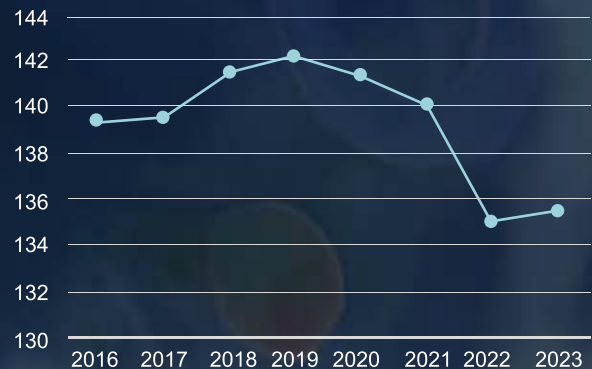


434,5 USD
Average Wage in Bishkek

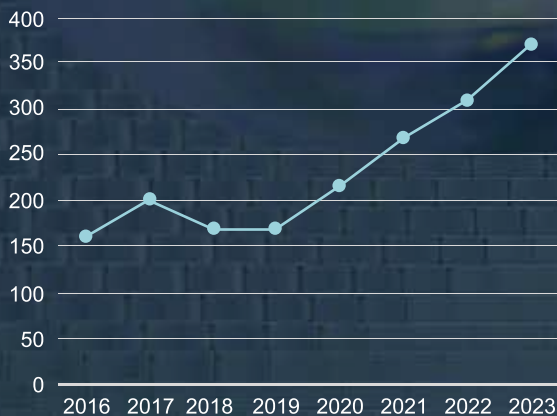


274 USD
Average Wage in
Healthcare in Bishkek

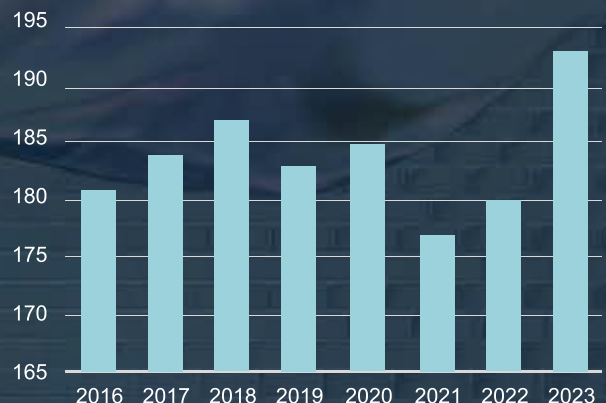
NUMBER OF DOCTORS IN KYRGYZSTAN, thousand people



COST OF MEDICAL SERVICES, MILLION USD



NUMBER OF HOSPITAL ORGANIZATIONS IN KYRGYZSTAN



Source: Stat.gov.kg 2023

** the numbers are based on the KGS/USD rate of 86,2 provided by the National Bank of the Republic of Uzbekistan as of Q3 2024

BISHKEK 2024

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Healthcare in Kyrgyzstan is developing, but it still lags behind its neighbors, such as Kazakhstan and Uzbekistan, in terms of financial investment and infrastructure. However, there has been growth in private clinics, the implementation of a medical insurance system, and the active development of medical tourism, which contributes to improving the accessibility and quality of healthcare services.

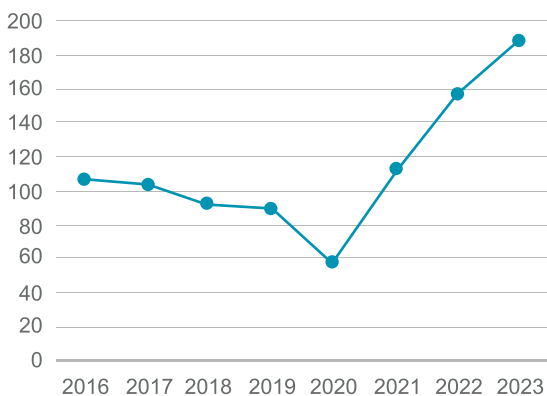
In Kyrgyzstan, **the system of mandatory health insurance (MHI)** was introduced to improve public access to healthcare services. The MHI system helps the government finance healthcare services to ensure they are available to all citizens. This insurance partially covers medical expenses, including treatment in both public and private institutions.

Private clinics receive payments from insurance companies that cover part of the cost of healthcare services for insured citizens. This helps private healthcare institutions increase the number of patients served and maintain financial stability.

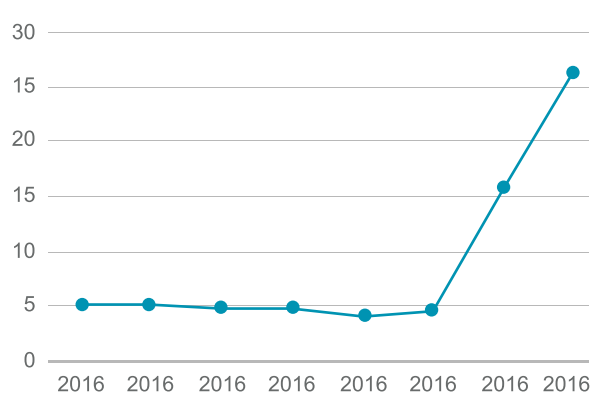
Building on the development of healthcare and the introduction of medical insurance in Kyrgyzstan, the country has also become a **popular destination for medical tourism**. Medical tourists often seek treatment in both hospitals and sanatoriums. However, the majority of medical tourists are drawn to **sanatoriums**, particularly in the **Issyk-Kul region**. This is due to the popularity of sanatorium and spa treatments offered in these areas, as well as the well-known healing properties of natural springs and the favorable conditions for rehabilitation.

Sanatoriums at Issyk-Kul not only provide medical procedures but also offer recovery after surgeries, rehabilitation, and treatment for musculoskeletal and skin diseases. Issyk-Kul is an important resort where tourists combine healing with relaxation. The natural therapeutic factors, such as mineral waters and muds, attract visitors who need recovery after illnesses.

THE NUMBER OF INDIVIDUALS SERVED IN SANATORIUMS AND RECREATIONAL FACILITIES, THOUSAND



THE NUMBER OF BEDS PER MONTH AT MAXIMUM CAPACITY IN SANATORIUMS AND RECREATIONAL FACILITIES, THOUSAND



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