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ANALYSIS OF THE VOLUME AND STRUCTURE OF HEALTH CARE SERVICES IN UKRAINE

ABSTRACT

The purpose of this research article is to analyze the volume and structure of healthcare services in Ukraine in order to determine promising directions for the work of the national healthcare system, as well as to ensure the specified development parameters of the industry.

To achieve this purpose, the research was conducted using the materials of the State Statistics Service of Ukraine and the data of the Ministry of Health to analyze the volume and structure of healthcare services in Ukraine in order to determine promising directions for the work of the national health care system, as well as to ensure the specified development parameters of the industry. The methodological basis of the research was made up of general and special methods, namely: system analysis with the aim of a comprehensive characterization of the strategic potential of the healthcare industry; statistical analysis (the standard deviation method) with the aim of analyzing the structure of healthcare facilities of Ukraine; the dynamics of the volume of sold products (goods, services) of business entities that provide services in health care and social protection; synthesis and comparison in diagnosing the state of the regional structure of private medicine in Ukraine and the dynamics of capital investment volumes of enterprises providing healthcare services.

It has been established that at the current stage of the functioning of the healthcare market, the sources of funding for state medicine cannot fully provide the healthcare system with the necessary financial resources, introduce new methods of payment for health care and services, as well as improve the system of mandatory health insurance.

Budget institutions should carry out marketing research, increase the level of comfort in the provision of healthcare services, increase the level of efficiency of the existing resource potential, especially human resources; develop, improve and diversify new types of services, and create decent conditions for organizing healthcare services.

Paid healthcare services are characterized by the significant potential for growth, which is determined by the needs of the market and the population of the country. This segment of the economy is extremely promising in the direction of obtaining alternative opportunities for treatment and recovery in more comfortable conditions in accordance with the growing requirements for the quality of healthcare services and the availability of an individual approach to each patient.

Keywords: healthcare services, health care system, private medicine, medical equipment, state healthcare services

JEL Classification: E23, I11, I14, I18

INTRODUCTION

In terms of the dynamic development of modern society, the growth of requirements for the quality of services provided, in particular in the healthcare industry, necessitates the analysis of the volume and structure of healthcare services in Ukraine in order to determine promising directions for the work of the national health care system. The development of a system for collecting, storing, processing and transmitting information is becoming a necessary condition for improving the healthcare system at the state and regional levels, as well as an important condition for improving the efficiency of healthcare facilities and improving the quality of healthcare services. Much attention is

being paid to solving this issue in Ukraine. In particular, the Draft "The Strategy for the Development of the Health Care System till 2030" was developed, guided by the Decree of the President of Ukraine No. 369/2021. Five priority directions were defined in the Draft: health governance, universal health coverage, public health, involvement of people and communities, and human resources of the system.

At the same time, the intensity of the dynamics of robotization and intellectualization of society requires the urgent formation of a complex of technical, technological and info-communication developments, thanks to which it is possible to significantly reduce the non-productive time of the professional activities of medical personnel, increase the efficiency of the industry by using high-quality medical equipment, and meet the needs of the medical personnel and population in the area of medical education, reduce the financial costs for upgrading the skills of healthcare workers, promote the strengthening and development of scientific potential, provide the population with the possibility of free access to quality healthcare services

Obtaining all of the listed potential benefits determines the need for organizational changes in the formation and functioning of the national health care system. The reluctance to resist changes (conservative approach) on the part of the Government, as well as the lack of financial resources for the development of the industry, are the main problems in implementing the tasks of improving the health care system. Therefore, the analysis of the health care market in terms of improving the efficiency of the industry remains relevant at this stage.

LITERATURE REVIEW

The results of the analyzed studies on the analysis of the health care market indicate the existing problems in ensuring the process of organization of activities of the national health system at a high level [2; 3; 4]. The scientific publications on this subject also provide a number of various facts about the lack of a management concept that is satisfactory for national healthcare facilities [5; 6]. In the publications on the study of management concepts, it is noted that management as a process of making and implementing effective decisions in practice is a sufficiently multifaceted category, according to which management approaches change, depending on the sphere of activity of an economic entity, general economic changes and other factors.

Regarding the current state of performance management in the studied area, the need for further research in this direction is argued in the works of scientists: "Despite active scientific researches and certain achievements, not enough attention has been paid to the problems of implementing new approaches to the management of healthcare facilities in market conditions and in the context of the COVID-19 pandemic" [1; 7].

Taking into account the specifics and social and public nature of health management, health in scientific works is considered through "the creation of a complex of the modern, holistic mechanism of state-administrative influence, which could largely prevent the miscalculations and mistakes that took place in the healthcare industry" [8]. The methods of analysis of the health care market also include the analysis of the functioning of all market entities, the joint activity of which will ensure "the sequence and timing of the implementation of various management measures" [9]. In this article, the analysis of the health care market is carried out through the diagnosis of the volume and structure of the healthcare services in Ukraine in order to identify the promising directions for the work of the national health care system, as well as to ensure the specified development parameters of the industry.

AIMS AND OBJECTIVES

The purpose of this scientific research article is to analyze the volume and structure of healthcare services in Ukraine in order to identify promising directions for the work of the national healthcare system and ensure the specified development parameters of the industry.

METHODS

The research was conducted using the materials of the State Statistics Service of Ukraine and the data of the Ministry of Health to analyze the volume and structure of healthcare services in Ukraine in order to determine promising directions for the work of the national health care system, as well as to ensure the specified development parameters of the industry. The methodological basis of the research was made up of general and special methods, namely: system analysis with the aim of a comprehensive characterization of the strategic potential of the healthcare industry; statistical analysis (the

standard deviation method) with the aim of analyzing the structure of healthcare facilities of Ukraine; the dynamics of the volume of sold products (goods, services) of business entities that provide services in health care and social protection; synthesis and comparison in diagnosing the state of the regional structure of private medicine in Ukraine and the dynamics of capital investment volumes of enterprises providing healthcare services.

RESULTS

The rapid development of digital medical technologies requires significant investments, which in the current conditions of economic development cannot be financed with own working capital. This is where the volume and sources of financing, which will allow income to cover the payment of obligations, are appropriate, and, accordingly, will make capital investments possible and financially feasible.

According to the developed national Draft "The Strategy for the Development of the Health Care System till 2030", the following results are expected by 2030 [21]:

- increasing the life expectancy for men and women by 3 years (up to 70 to 80 years, respectively);
- reducing maternal and child mortality to the average level of the EU;
- reducing premature mortality from non-communicable diseases by one-third;
- reducing the level of disability due to diseases through prevention;
- reducing morbidity and disability due to tuberculosis, HIV and hepatitis C;
- reducing mortality due to traffic accidents by one-third;
- reducing tobacco, alcohol and salt consumption.

In Ukraine, private medical businesses and public healthcare institutions are seeking to buy more and more high-quality medical equipment that the state cannot provide. The cost of equipment is offset by lower production costs and lower wages, which in turn ensures high returns for investors.

As at January 1, 2021, there were about 17,000 healthcare facilities in Ukraine (including: 1,714 hospitals; 10,373 outpatient polyclinic institutions; 5,344 private offices) [22]. Examples of medical technologies include high-precision robotic surgical devices, top-quality medical imaging equipment for early diagnosis, laboratory automation to reduce turnaround time to results, point-of-care testing to rapidly sort patients, automated dispensing system to reduce medication errors, telemedicine to ensure access to care and others.

The results of the analysis of the statistical data on the volume of implemented services in the healthcare sector of Ukraine proved the fact that after the critical point of decline in 2014 (UAH 9.2 billion), the volume of services increased by an average of 30% annually and reached the value of UAH 24.8 billion in 2021 [23] (Fig. 1-2).

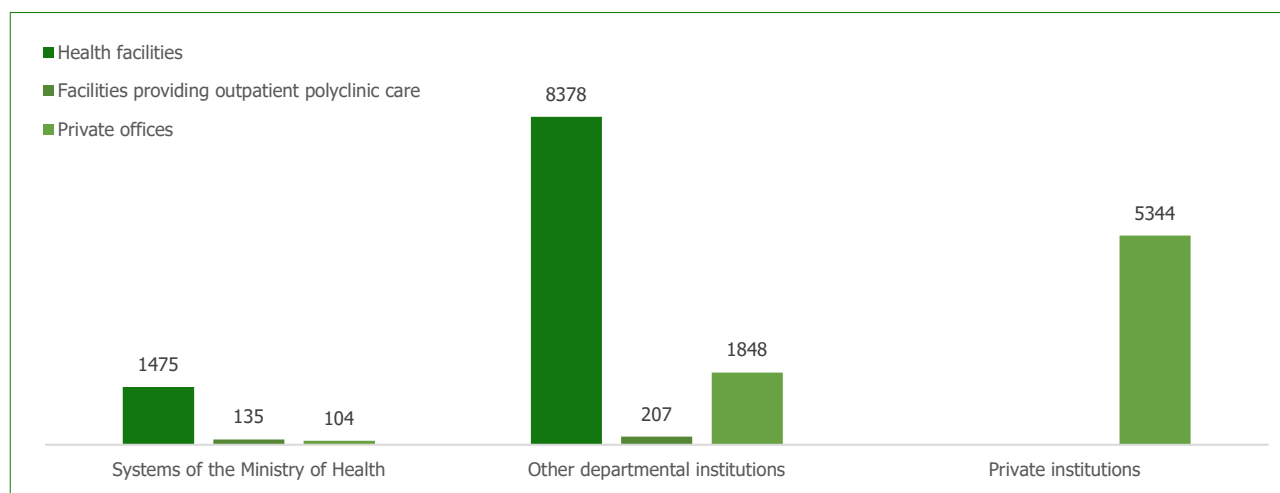


Figure 1. Structure of healthcare facilities of Ukraine (2020-2021). (Source: Handbook "Medical personnel and the network of healthcare facilities of the Ministry of Health of Ukraine for 2020-2021")

It should be noted that at the same time the relative share of healthcare services provided by individual entrepreneurs has increased.

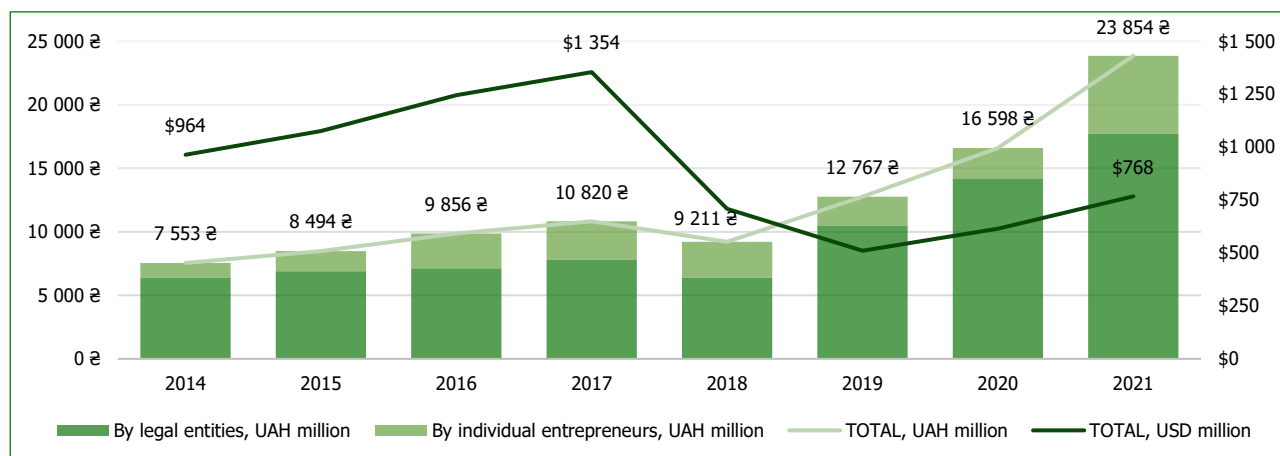


Figure 2. Dynamics of the volume of sold products (goods, services) of business entities that provide services in healthcare and social protection. (Source: State Statistics Service of Ukraine)

The growth of the private healthcare market in Ukraine is due to the increase in demand for services, the emergence of new players and increased confidence in private medicine. In 2020, healthcare services with a total cost of UAH 14.3 billion were provided in Ukraine, and in 2021, this indicator increased by 28.3% and reached the value of UAH 18.7 billion [23].

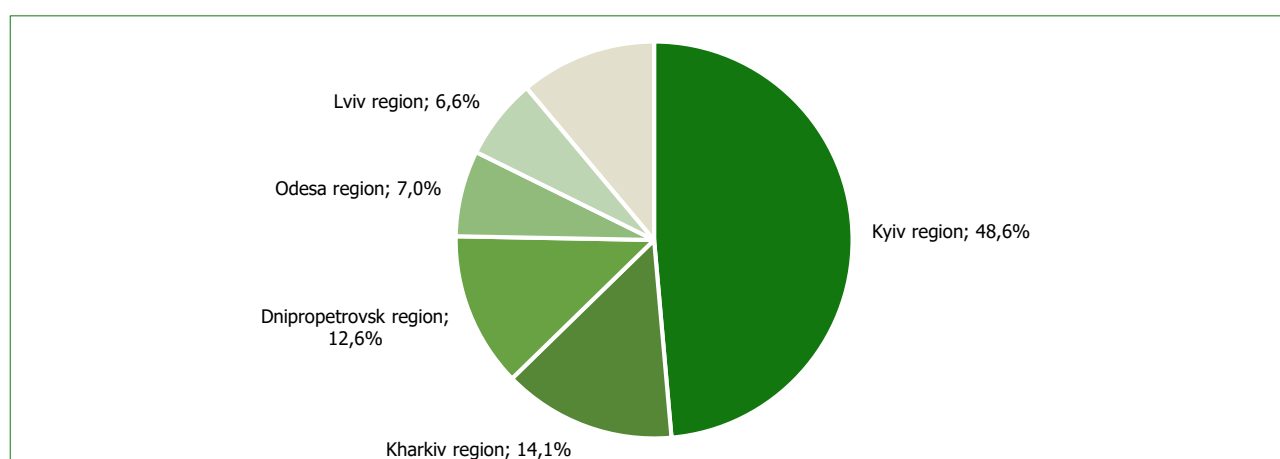


Figure 3. Regional structure of private medicine in Ukraine, % (2021). (Source: State Statistics Service of Ukraine)

The healthcare services market is concentrated in large cities in Ukraine. Kyiv dominates with a share of 48.6%. It is followed by Kharkiv, Dnipro, Odesa and Lviv. These are cities with a large population and economic growth, which is a favourable condition for the development of private medicine (Fig. 3).

The modern market of private healthcare facilities includes large system-network universal institutions (broad-profile clinics) and small highly specialized offices (dentistry, gynaecology, cosmetology, etc.). It should be emphasized that all private healthcare facilities are companies in the SME segment.

A selective study of the specialization of private healthcare facilities indicates the dominance of therapeutic, surgical, dental and gynaecological clinics. Unlike the public sector, there is competition between market participants in private healthcare services, which encourages them to constantly improve the efficiency of their work, improve the quality of services by attracting highly qualified personnel, and purchase new equipment [18].

Another key trend in the development of the private healthcare services market is the consolidation of market players due to the expansion of the profile and format of an institution, as well as the development of a network of medical centres. The highest level of satisfaction with the work of doctors is observed in the following areas: paediatricians - 77.6%, district therapists or family doctors - 75.8%, dentists - 71.4%.

The lowest level of satisfaction with services is observed for the care provided in hospitals - 55.9%, in maternity hospitals - 64.1%, and by narrow-profile specialists in polyclinics - 65.9%. According to the conducted research, there are significant regional differences [22] (Fig. 4).

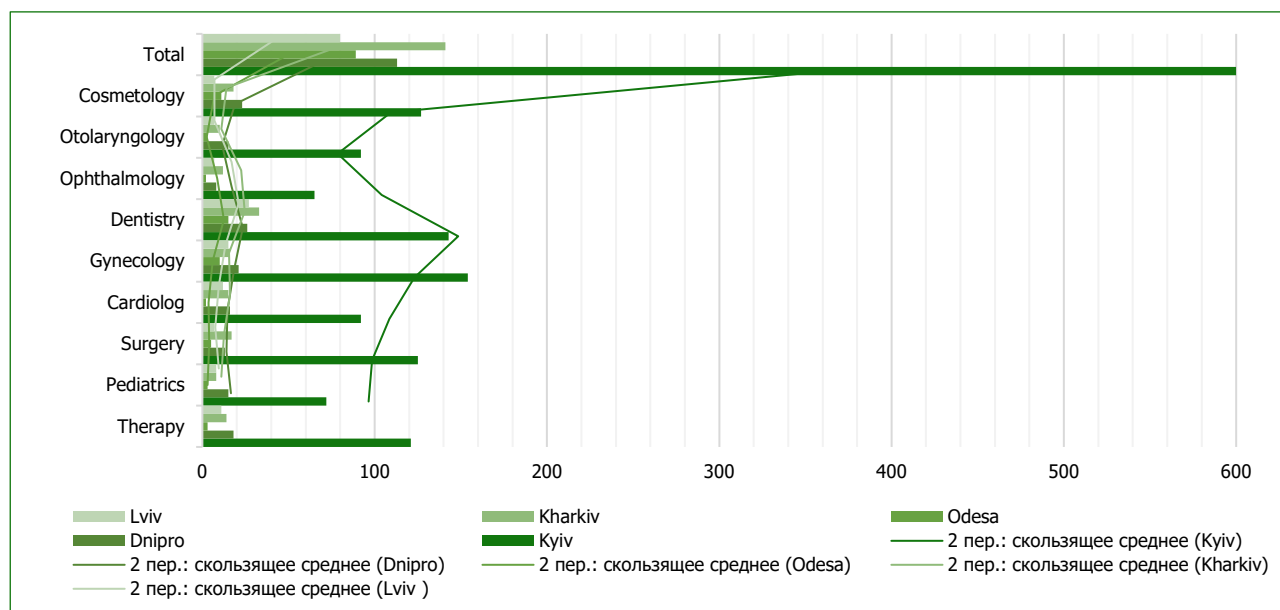


Figure 4. Number of private health care facilities in the largest cities of Ukraine (by main specializations), 2021. (Source: State Statistics Service of Ukraine)

Over the past 5 years in Ukraine, the absolute volume of financing of health care costs from the budgets of all levels has increased significantly, but the share of budget health care costs to GDP has decreased from 3.8% to 3.3%. At the same time, the average monthly household spending on health care tripled from UAH 1,768 in 2014 to UAH 4,285 in 2021, and the share of these costs in the aggregate increased from 3.2% to 6.0% (Fig. 5).

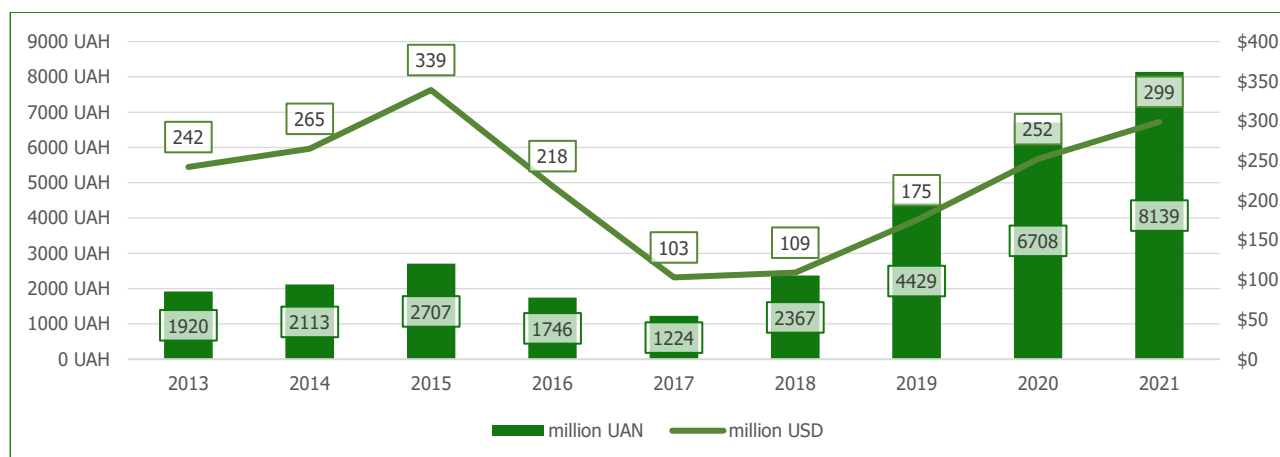


Figure 5. Number of private healthcare facilities in the largest cities of Ukraine (by main specializations), 2021. (Source: Built by the author based on the source [24])

One of the important global sources of financing for health care costs is health insurance. In Ukraine, the specified type of insurance is used on a voluntary basis and its share in the financing of costs is insignificant. However, it should be noted that the volume of payments under health insurance contracts has been steadily growing in recent years. Thus, in 2003, only UAH 16 million of costs were financed by insurance companies, in 2015 - UAH 1.39 billion, in 2018 - UAH 2.01 billion, and in 2021 - UAH 2.85 billion [22]. Based on the above, it should be mentioned that in Ukraine, health insurance and other types of insurance, which are directly or indirectly related to the healthcare industry, are steadily becoming a significant source of health care financing, which will have a beneficial effect on the development of the national health care system for a long period of time [19].

Analyzing the dynamics of capital investments, it should be noted that during 2018-2021 there was an increase in capital investments in healthcare facilities in Ukraine. The absolute indicators of capital investments in the healthcare sector for the year 2021 in the dollar equivalent reached a value of about US\$325 million. However, the dynamics of the trend indicates a real investment recovery in currency terms, despite the failure of capital investments in 2014-2015 (Fig. 6).

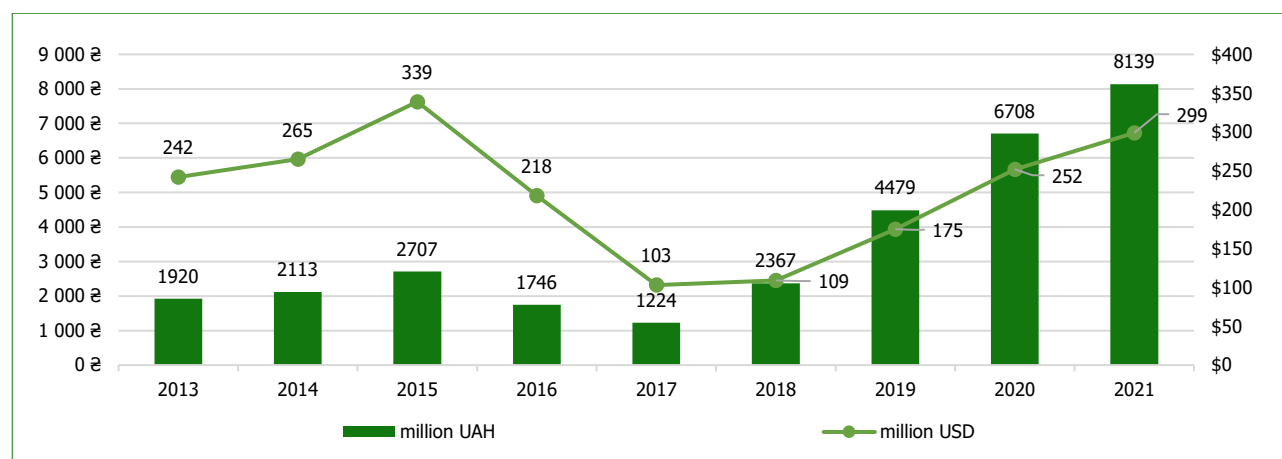


Figure 6. Dynamics of the volume of capital investments of enterprises providing the healthcare services. (Source: State Statistics Service of Ukraine)

At the end of 2021, the residual value of the fixed assets of the entities that provide healthcare services amounted to UAH 11.7 billion, and the total depreciation rate was 45.6% (in Ukraine as a whole, 55.1). At the same time, in 2021, fixed assets worth UAH 2.1 billion were put into operation. [24].

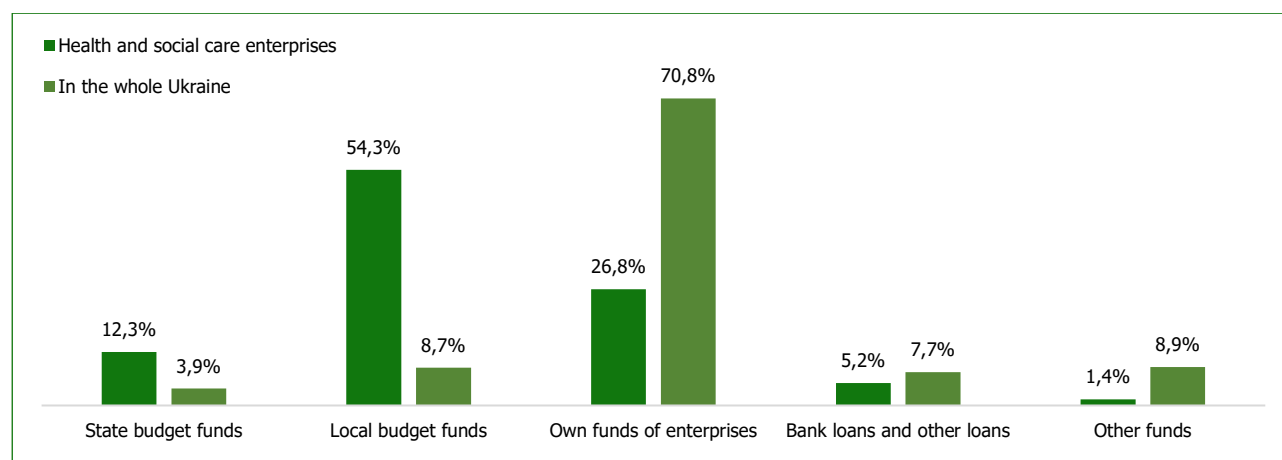


Figure 7. Main sources of financing of capital investments in health care, % (2021). (Source: State Statistics Service of Ukraine)

The conducted analysis of the main sources of financing of capital investments in the healthcare sector has indicated that in 2021 58.7% of the capital investments of all health and social care enterprises were financed by local budgets, 26.8% - at the expense of own funds and only 5.2% - at the expense of credit resources of banks and other loans. Such significant amounts of budget financing are explained by a large number of state and departmental healthcare institutions. At the same time, the results of the data from representatives of private healthcare institutions indicate that more than 70% of all capital investments are financed by their own funds [24].

Thus, it has been defined that during the studied period the healthcare services market of Ukraine was influenced by several significant factors that determined its current state. One of these factors is the current state of public medicine. The reform of this area can lead to the formation of a more transparent mechanism for functioning and financing, which should further improve the quality of services in the future. In turn, the competition between private and public medicine will intensify. Such a development of events should be expected in the next 3-5 years.

The level of competitiveness of public medicine, in particular, will be influenced by a number of macroeconomic factors, such as healthcare costs, the level of inflation, the exchange rate of the national currency and the level of income of the

population, as well as the quality of the implementation of the medical reform in Ukraine at the level of ministries and departments.

A distinctive feature of the private healthcare market, including the premium segment, is the use of modern technologies, not only in terms of examination and treatment but also in terms of accompanying services related to processing automation, storage and analysis of patient data. Investing in the digitalization of the healthcare sector can help improve the use of medical data in research and support initiatives in healthcare personalization. Digital innovations do not replace a person, but, on the contrary, facilitate his work and expand his capabilities.

The current crisis financial and economic state of the country and the reforms that were introduced in the healthcare sector directly affect the formation of trends in the healthcare services market in Ukraine. Taking into account the factors listed above, the following trends will be observed in the healthcare services market in the future:

- The emergence of new players in the market. Unlike public medicine, the private healthcare services sector is a promising business, since every year more and more Ukrainians use the services of private medicine, the share of which, compared to European countries, is relatively small. On the other hand, with the improvement of the investment climate, the share of new investors will increase in the private healthcare market.
- Expansion of network players by opening new clinics or absorbing single players. It is a well-known fact that a significant share of the private healthcare market is observed in Kyiv. Up to 10 large clinics can be identified in the Ukrainian market, the income of which and the level of investment in equipment are many times higher than medium and small players, but this does not prevent the latter from developing in this market in Kyiv and in other regions of Ukraine. However, the majority of players are still focused on the people with the average income, who are gradually moving from public to private healthcare services.
- Diversification activities towards the provision of new types of healthcare services and their combination. The use of technical and technological novelties and innovations in modern conditions in treatment makes it possible to attract foreign healthcare personnel who have experience in treating complex diseases, and the availability of modern medical equipment in the clinic will allow them to determine the diagnosis and treat as accurately as possible. In this case, we can talk about the emergence of completely new players, as well as the expansion of existing ones.

CONCLUSIONS

Thus, the results of the analysis of the volume and structure of healthcare services in Ukraine made it possible to draw certain conclusions about the prospects for the functioning of the healthcare market for a long-term period of time. In this regard, we have identified key priority directions for the development of the industry, namely such as:

- Improving the quality of healthcare services provided by public healthcare facilities, taking into account the fact that, unlike the public segment, the private healthcare services market has more highly qualified and motivated staff and better medical equipment, which positively affects the quality of patient care.
- Upgrading of skills of healthcare professionals in accordance with European standards (at the end of 2021, there were 284,000 doctors in Ukraine, of which only 9%, or 18,800 doctors, worked in private healthcare facilities).
- Decrease in the proportion of medical staff of retirement age (during the study period, this proportion was 22.5% among doctors and 10.9% among junior specialists). The number of doctors (excluding dentists) per 10,000 population was 45.1 against 50.3 in 2014.
- Consolidation of players in the private healthcare services market. This trend has arisen and continues as a result of the expansion of the profile and format of healthcare facilities, the development of a network of medical centres, and mergers and acquisitions of private healthcare facilities.
- Extending life expectancy and population ageing, as well as improving the system of prevention and promotion of a healthy lifestyle. At this time the demographic situation in Ukraine is characterized by a decline in the birth rate, an increase in mortality and, as a result, population ageing, which disrupt the favorable demographic balance. The elderly population of Ukraine (persons aged 65 and over) at the end of 2021 amounted to 5.5 million people (16.55% of the population), of which 4.6 million were women.
- Satisfying the demand for quality health care services in private and public medicine. The main access of the population to healthcare services is currently provided by the state healthcare system, which provides the primary link of healthcare services. The quality of the services provided is not satisfactory, and the services of private medical facilities are not generally available due to a number of reasons: limited presence in the regions, price, and a smaller range of services than in public ones.

- Increasing the level of development of healthcare insurance. Healthcare insurance throughout the world plays the role of one of the sources of financing for the healthcare industry, but in Ukraine, its use is limited due to the high risks associated with the current regulation of non-bank financial institutions and the low level of trust in insurance.
- Reducing initial investment in order to create a favorable investment climate for domestic and foreign investors. In particular, the private health care business has a long payback period for investors, primarily due to the need to invest significant sums at the initial stage.

Thus, as a result of the research, it has been established that at the current stage of the functioning of the healthcare services market, the sources of funding for public medicine cannot fully provide the healthcare system with the necessary financial resources, introduce new methods of payment for health care and services, as well as improve the system of mandatory health insurance.

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АНАЛІЗ ОБСЯГУ ТА СТРУКТУРИ ПОСЛУГ ОХОРОНИ ЗДОРОВ'Я УКРАЇНИ

Метою цієї статті є аналіз обсягу та структури надання медичних послуг в Україні з метою визначення перспективних напрямів роботи національної системи охорони здоров'я, а також забезпечення заданих параметрів розвитку галузі. Для досягнення поставленої мети було проведено дослідження з використанням матеріалів Державної служби статистики України та даних МОЗ щодо аналізу обсягів та структури надання медичних послуг в Україні з метою визначення перспективних напрямів роботи національної системи охорони здоров'я, а також забезпечення заданих параметрів розвитку галузі. Методологічну основу дослідження склали загальні та спеціальні методи, а саме: системний аналіз задля комплексної характеристики стратегічного потенціалу галузі охорони здоров'я; статистичний аналіз (метод стандартного відхилення) з метою аналізу структури закладів охорони здоров'я України; динаміка обсягів реалізованої продукції (товарів, послуг) суб'єктів господарювання, які надають послуги у сфері охорони здоров'я та соціального захисту населення; синтез та порівняння в діагностиці стану регіональної структури приватної медицини в Україні та динаміки обсягів капітальних інвестицій підприємств, що надають медичні послуги.

Установлено, що на сучасному етапі функціонування ринку медичних послуг джерела фінансування державної медицини не можуть у повному обсязі забезпечити систему охорони здоров'я необхідними фінансовими ресурсами, запровадити нові форми оплати медичних послуг та послуг, а також удосконалити систему обов'язкового медичного страхування.

Платні медичні послуги характеризуються значним потенціалом зростання, який визначається потребами ринку та населення країни. Цей сегмент економіки є надзвичайно перспективним у напрямі отримання альтернативних можливостей лікування та оздоровлення в більш комфортних умовах відповідно до зростаючих вимог до якості медичних послуг та наявності індивідуального підходу до кожного пацієнта.

Ключові слова: медичні послуги, система охорони здоров'я, приватна медицина, медичне обладнання, державні послуги з охорони здоров'я

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