



ANALYTICAL OVERVIEW

**OF THE LIFE SCIENCES AND HEALTH
ECOSYSTEM IN THE
IVANO-FRANKIVSK CITY
AMALGAMATED COMMUNITY:**

**DISCUSSION'S MATERIALS
AND STAKEHOLDERS' DIALOGUE
OUTCOMES**

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The Ivano-Frankivsk city community makes significant efforts to preserve and develop social capital, attract opportunities, and create the conditions for sustainable development in the area. The municipality is taking steps in various areas, including Life Sciences and Health. Recently, **the concept of the HealthCities project** was presented to the city residents. The day after, **a meeting with stakeholders** was held within the project, bringing together representatives of the authorities, business, science, and education from the Ivano-Frankivsk community to discuss the topic, approach, and methodology of territorial assessment of the Life Sciences & Health ecosystem. The meeting participants analyzed the assessment methodology proposed by European partners, discussed analytical data, and outlined key trends in the health industry in the Ivano-Frankivsk region.

**HEALTHCARE INDUSTRY TRENDS.
HOW IS THE UKRAINIAN MEDICAL BUSINESS CHANGING?**

The 11-year struggle in Ukraine for dignity and a European future, as well as the large-scale invasion of 2022, brought significant changes in the structure and activities of the medical industry. *“In Ukraine in 2024, there was stable demand for medical services, independent of the season,”*¹ — according to a study by the Inweb team, which used Google Market Explorer and DOC.UA data to examine patient activity in the winters of 2022, 2023, and 2024. The analysis identified changes in demand, geography of visits, and market structure, and outlined key trends in the healthcare industry in Ukraine. Overall, the healthcare industry in Ukraine underwent significant changes, among which the following are considered the key ones.

¹ [Medicine in Ukraine: research on the medical clinic market in 2024](#). CASES Media, 2025.

REALLOCATION OF MEDICAL RESOURCES. The war led to large-scale population migrations and the need to rethink the provision of medical services in the new conditions. As of 2024, there were 4.6 million IDPs²; registered in Ukraine; 4.1 million Ukrainians³, were officially granted shelter in the EU, and the first wave of IDPs occurred in Ukraine back in 2014 (at that time, according to various estimates, approximately 1.1 million Ukrainian citizens, mainly residing in the Luhansk and Donetsk regions, as well as the Autonomous Republic of Crimea and the city of Sevastopol, were forced to leave their homes).⁴.

INCREASED DEMAND FOR MEDICAL SERVICES. Hostilities led to increased demand for medical services in the country. In July 2022, demand for medical services was 12 times higher than in January of the same year.⁵.

DEVELOPMENT OF THE PRIVATE SECTOR. A significant increase in demand and systemic reform of the industry led to the growth of the private sector in the healthcare industry, with the cost of health insurance rising by 20% in 2024.

HUMAN RESOURCE CHALLENGES. The outflow of social capital from the country particularly affected the medical sector. The war caused significant risks of staff replacement.

INSTITUTIONAL TRANSFORMATIONS IN MEDICAL EDUCATION. Systemic reforms in education, including higher education, also affected the medical education sector. The need to bring educational offerings in line with current demands led to challenges in rethinking the list of specialties and areas of training, which is causing considerable difficulties in the academic environment of the sector.

These trends also affected the regional level, particularly in the Ivano-Frankivsk region. As of 2024, there were **2,996 medical institutions and companies**, operating in the Ivano-Frankivsk region, including 1,070 institutions in the regional center.

² [Ukraine Human Capital Chartbook: how human capital determines Ukraine's development prospects](#). KSE, 2025

³ [4.1 Million People Under Temporary Protection in July](#) EUROSTAT, 2024

⁴ As of the end of February 2015, there were 1,092,405 internally displaced people in Ukraine. Of these, approximately 20,000 were from Crimea and more than 1,070,000 were from eastern Ukraine. About 60% of IDPs are pensioners, 23.1% are employable persons, 12.8% are children, and 4.1% are disabled persons (author).

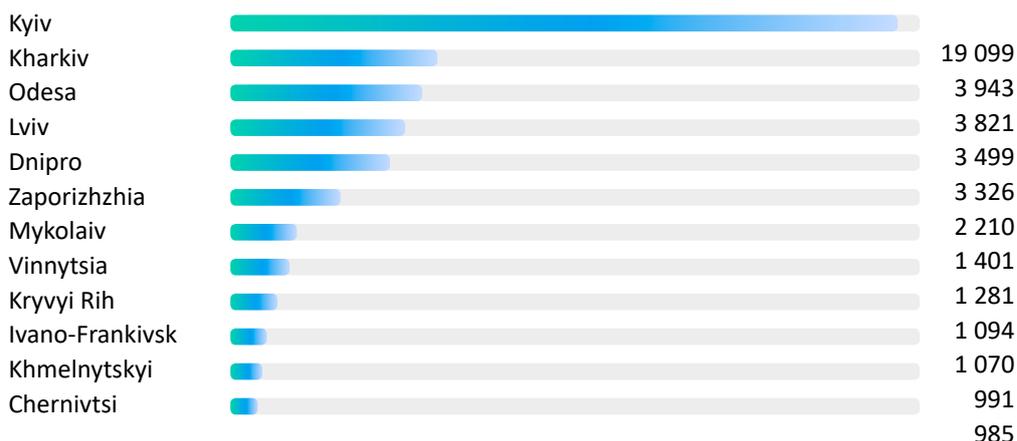
More details here: [Solodko, A., Doronyuk, T. Developing a policy on IDPs in Ukraine. CEDOS, 2015. 16 p.](#)

⁵ Source: Medicine in Ukraine [Medical Clinics Market Research in 2024](#). CASES Media, 2025.

THE NUMBER OF MEDICAL FACILITIES AND COMPANIES IN UKRAINE

The catalogue of Ukrainian companies is created based on open data and YC.Market. It contains information about all current legal bodies and individual entrepreneurs (IE). YC.Market covers 7 million companies and entrepreneurs, it helps to find clients and suppliers, and also to analyze the market with the help of more than 30 filters.

Medical facilities in Ukraine by city

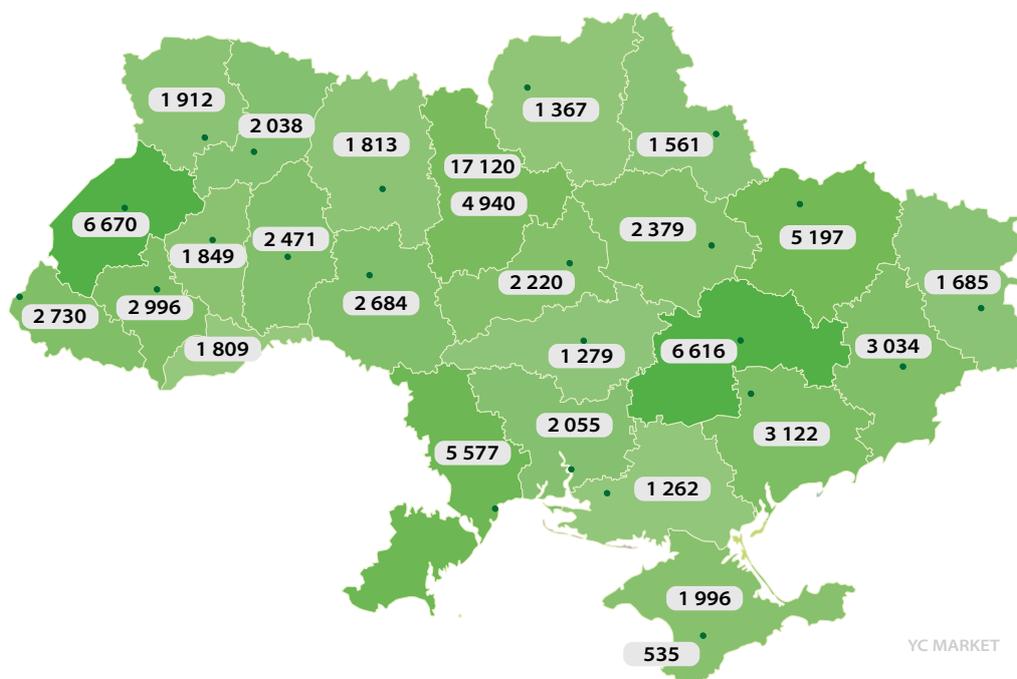


All active **89 117**

Active companies **47 790**

Active IEs **41 327**

Medical facilities in Ukraine by region



Number of Medical Institutions and Companies in Ukraine ⁶

⁶ Source: Medicine in Ukraine: [Medical Clinics Market Research in 2024](#). CASES Media, 2025.

The demographic dynamics of the region are characterized by depopulation trends. As of January 1, 2022, the population of Ivano-Frankivsk region was 1.353 million people. Between 2019 and 2022, the population decreased by 16,000 people. Between 1991 and 2022, the region's residents aged by five years. Specifically, as of 1991, the average age of the population of Ivano-Frankivsk region was 34.9 years; in 2022, it was 40.1 years⁷.

With the beginning of the war, Ivano-Frankivsk region became a second home for a significant part of Ukrainians. The population structure of the Ivano-Frankivsk region has changed significantly since the full-scale invasion. In the spring of 2022, the number of internally displaced persons in the region peaked (over 140,000 people, mainly from the Kharkiv, Chernihiv, Donetsk, Kherson, and Mykolaiv regions)⁸. As of October 2024, according to the media agency Galka⁹ according to data of the Ivano-Frankivsk Regional State Administration, **113,389 IDPs were**, living in the Ivano-Frankivsk region, including:

- 51, 389 – of working age;
- 4, 605 – jobseekers;
- 4, 196 – people with disabilities;
- 17, 055 – of retirement age;
- 31, 554 – children;
- 4, 590 – other categories.

THE ECOSYSTEM OF LIFE SCIENCEI & HEALTH IN THE IVANO-FRANKIVSK TERRITORIAL COMMUNITY

It is worth noting the significant demand for medical services in the region. It is likely that 8 out of 10 community residents visited community medical facilities at least once during the previous year. According to the 2024 [Report on the Work of the Healthcare Department of the Ivano-Frankivsk City Council](#),¹⁰ medical assistance was provided to **290,000 residents** of the community last year, including:

- **38, 947** inpatient patients;
- **2, 325** intensive care patients;
- **14, 288** surgeries;
- **82, 777** X-rays;
- **10, 436** CT scans;
- **8, 245** endoscopic examinations etc.

⁷ Cited from [FrankoLytics research materials](#): Bavoliak Y., Basarab N., Bilous S. Maksymovych O., Mosora M., Osypchuk M., Piatkivsky R. Research on the youth sector of the Ivano-Frankivsk territorial community: analytical report / ed. by Maksymovych O. Ivano-Frankivsk, Carpathian Institute of Analytics 'FrankoLytics', 2025. 219 p.

⁸ [When I talk to the soldiers, I realize that victory is coming soon. An interview with the head of the Ivano-Frankivsk Regional Military Administration](#). Suspilne Ivano-Frankivsk, 2022.

⁹ [It became known how many IDPs live in Prykarpattia \(Statistics\)](#). Galka.if.ua.Ivano-Frankivsk, 2024.

¹⁰ [Report on the work of the Office of Health Care of Ivano-Frankivsk City Council for 2024](#).

In addition, during 2024, specialized community institutions provided medical assistance to **2,408 adults and 1,128 children from among IDPs**. Also, in 2024, community healthcare institutions provided medical services to **2,514 military personnel**.

The dynamics of document management services in the medical sector of the Ivano-Frankivsk community (2024) demonstrate a significant level of business activity:

- **2, 956** citizen appeals;
- **23** information requests;
- **36** public information requests;
- **10** appeals to the “1580” contact center;
- **59** oral appeals to the mayor and deputy mayor;
- **5** lawyer requests;
- **7** deputy requests;
- **2** electronic petitions;
- **20** requests from military units;
- **1, 467** outgoing letters.

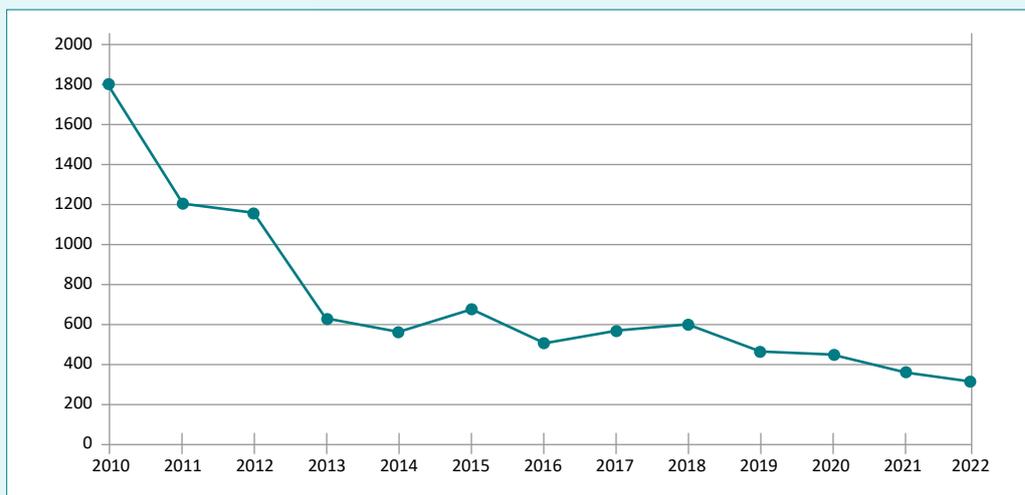
As of December 31, 2024, the total number of employees in healthcare institutions of the Ivano-Frankivsk City Council was **3, 209**. In particular, the total number of employees in specialized medical care was – **2, 496**. **60 employees** of community healthcare institutions were mobilized since the beginning of the war.

It is worth noting the considerable burden on community healthcare facilities. As of 2024, **215, 212 declarations** were signed with residents of the Ivano-Frankivsk city territorial community and internally displaced people. In the same year, **1, 311, 837 patient** visits to outpatient and polyclinic healthcare facilities of the City Council were recorded ¹¹.

¹¹ Data sourced from: FrankoLytics analytical report «[Higher Education, Science. Adult education, including non-formal education](#)», 2024.



Human resources in the Life Sciences & Health sector in the Ivano-Frankivsk region showed negative dynamics. According to the Main Department of Statistics in the Ivano-Frankivsk region, the dynamics of changes in the number of employees involved in scientific research and development are negative, with **the number of scientific workers in the region falling threefold between 2010 and 2022.**

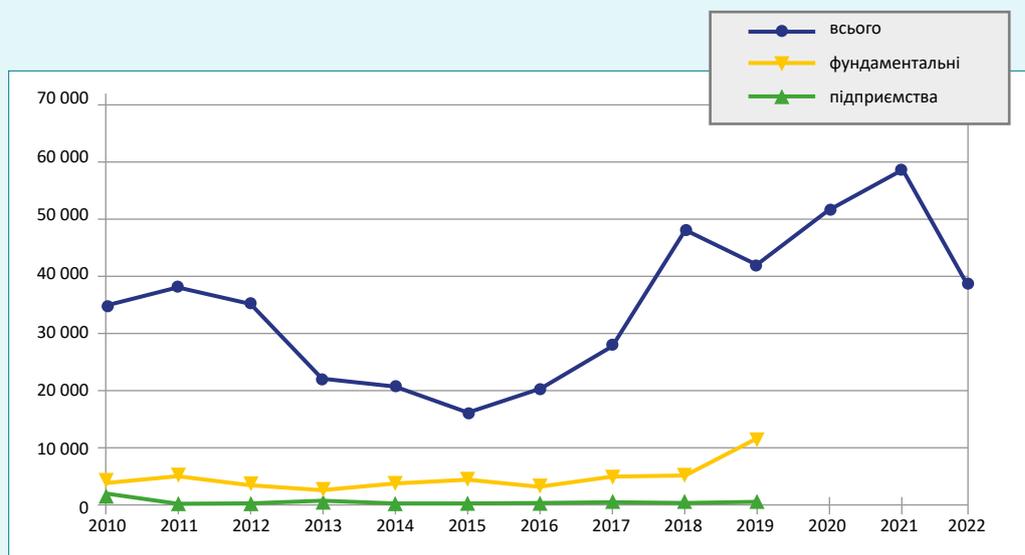


NUMBER OF SCIENTIFIC WORKERS: IVANO-FRANKIVSK REGION
2010 - 2022¹²



¹² Data sourced from: FrankoLytics analytical report «Higher Education, Science. Adult education, including non-formal education», 2024.

The amount of funding for research between 2010 and 2022 also showed negative dynamics. Thus, at the beginning of 2022, **total funding for scientific research in the region fell to the level of 2018.**



DYNAMICS OF EXPENDITURE ON SCIENTIFIC RESEARCH: IVANO-FRANKIVSK REGION 2020 - 2022¹³



¹³ Data sourced from: FrankoLytics analytical report «Higher Education, Science. Adult education, including non-formal education», 2024.

EDUCATIONAL INFRASTRUCTURE AND SOCIAL CAPITAL IN THE LIFE SCIENCES & HEALTH SECTOR

Educational services in the field of Life Sciences & Health in the Ivano-Frankivsk region are provided by six educational institutions. According to the [Unified State Electronic Database on Education](#), as of April 1, 2025, the following educational service providers were registered in the region: Municipal Institution of Professional Higher Education [Ivan Franko Kolomyia Professional Medical College Ivano-Frankivsk Regional Council](#); [Vasyl Stefanyk Carpathian National University](#); [Ivano-Frankivsk National Technical University of Oil and Gas](#); and [Ivano-Frankivsk National Medical University](#).

NUMBER OF STUDENTS STUDYING IN THE FIELD OF LIFE SCIENCES & HEALTH AT THE EDUCATIONAL LEVEL OF “PROFESSIONAL JUNIOR BACHELOR”: Ivano-Frankivsk Region – 2025¹⁴

Specialty code	Title of specialty	Title of educational institution	Number of students
223	Nursing	Ivan Franko Kolomyia Professional Medical College	226
226	Pharmacy, industrial pharmacy	Ivan Franko Kolomyia Professional Medical College	96

NUMBER OF STUDENTS STUDYING LIFE SCIENCES & HEALTH AT THE **BACHELOR’S DEGREE** LEVEL: Ivano-Frankivsk Region – 2025¹⁵

Specialty code	Title of specialty	Title of educational institution	Number of students
091	Biology and Biochemistry	Vasyl Stefanyk Precarpathian (Carpathian) National University	129
223	Nursing	Ivano-Frankivsk National Medical University	114
227	Therapy and rehabilitation	Vasyl Stefanyk Precarpathian (Carpathian) National University Ivano-Frankivsk National Medical University	582

¹⁴ Extract from the [Unified State Electronic Database on Education](#) as of April 01, 2025

¹⁵ Extract from the [Unified State Electronic Database on Education](#) as of April 01, 2025

NUMBER OF STUDENTS STUDYING FOR A **MASTER'S DEGREE**
IN THE FIELD OF LIFE SCIENCES & HEALTH:
Ivano-Frankivsk Region – 2025¹⁶

Specialty code	Title of specialty	Title of educational institution	Number of students
091	Biology and biochemistry	Vasyl Stefanyk Precarpathian (Carpathian) National University	27
221	Dentistry	Ivano-Frankivsk National Medical University	527
222	Medicine	Ivano-Frankivsk National Medical University	2203
226	Pharmacy, industrial pharmacy	Ivano-Frankivsk National Medical University	496
228	Pediatrics	Ivano-Frankivsk National Medical University	97
227	Therapy and rehabilitation	Vasyl Stefanyk Precarpathian (Carpathian) National University Ivano-Frankivsk National Medical University	143

In addition, educational services in the Prykarpattia region are provided by educational institutions registered outside the Ivano-Frankivsk region: the temporarily relocated [Kherson State University](#) and the [Kalush Polytechnic College](#). Specialties 162 “Biotechnology and Engineering” and 163 “Biomedical Engineering” seem promising for the future of the sector.

¹⁶ Extract from the [Unified State Electronic Database on Education](#) as of April 01, 2025

COMPONENTS OF TERRITORIAL ASSESSMENT

It is expected that over the next few years, measures aimed at improving the ecosystem of Life Sciences & Health will be implemented in the Ivano-Frankivsk community: analysis of policies and challenges in the sector, exchange of experience between regions, support for start-ups and small businesses, development of action plans to improve local policy, recruitment of personnel, and development of medical infrastructure, according to the website of the [Department of investment policy, projects, international relations, tourism, and city promotion of the Ivano-Frankivsk City Council](#) on the occasion of the start of the initiative. The aim of the project is to create an ecosystem that will promote the growth of biotechnology startups, expand the market for medical services, and introduce advanced technologies into the healthcare sector.

The effectiveness of the measures will be monitored using a territorial assessment tool. The corresponding LSH (Life Science & Health) territorial assessment will be carried out in the community as part of the Health Cities project.

The assessment tool consists of five sections, which are combined into an integrated SWOT analysis of the community ecosystem: overall ecosystem condition; governance; services; talent attraction; and outcomes ¹⁷.

- The component **assessing the overall state** of the community ecosystem involves evaluating the private sector, as well as the academic, public, and medical sectors: the size of the industry, the diversity of companies, the scientific potential, international cooperation, and the state of the healthcare system, its structure, innovative component, and cross-sectoral interaction.
- **The governance** component involves an analysis of existing governance structures, strategic frameworks, and the extent of institutional support for the industry, as well as the positioning of the nature of regional governance influence in the sector.

¹⁷ Territorial Assessment Template. [HealthCities Project](#). 2025

- **The services** component involves identifying opportunities for supporting start-ups and entrepreneurs; reviewing existing support mechanisms and the role of educational institutions; and analyzing funding sources and the investment landscape.
- **The talent attraction** component involves assessing human resource potential, the effectiveness of the education system, strategies for attracting international specialists, and mechanisms for transitioning from academia to industry.
- The final **SWOT assessment** identifies the strengths of the city's ecosystem, outlines gaps or weaknesses that require intervention, opportunities for policy improvement, and risks that could undermine policy improvement opportunities, which are directly used based on the results of the SWOT analysis.

TERRITORIAL ASSESSMENT: HYPOTHESES OF STAKEHOLDERS IN THE REGIONAL CENTER OF THE PRYKARPATTIA REGION

Most local stakeholders believe that the strengths of the Life Sciences & Health ecosystem in the Ivano-Frankivsk territorial community are human resources; the resource conditions for the development of the industry in the sector of physical rehabilitation of military personnel; the existing opportunities for the development of the mental health support industry for the population in general, and in particular for military personnel and their families. Firstly, these hypotheses are based on the existing potential of educational institutions in the region, human resources, and the recreational potential of the region.

According to the participants of the dialogue, the current **weaknesses** of the Life Science & Health ecosystem in the Ivano-Frankivsk territorial community include closed environments, a lack of communication, and inter-sectoral interaction between parties.

Stakeholders in Ivano-Frankivsk see **opportunities for the development** of the Life Sciences & Health ecosystem in the Ivano-Frankivsk territorial community, primarily in its geographical location near the Carpathians, the existing potential of educational institutions, and the long-standing and sustainable local culture of resilience and self-reliance.

Among **the risks** to the Life Sciences & Health ecosystem in the Ivano-Frankivsk territorial community, in addition to the primary risk of war, there were also challenges related to preserving the community's social capital.

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Analytical Overview of the Life Sciences and Health Ecosystem in the Ivano-Frankivsk City Amalgamated Community: Discussion's Materials and Stakeholders' Dialogue Outcomes.

*Carpathian Institute of Analytics
"FrankoLytics"*

*Ivano-Frankivsk, 2025
14 p.*