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Development of Medical Tourism in Uzbekistan: Analysis of the Current State, Strategies and Prospects

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Medical tourism is a dynamically developing sector of the global economy, driven by rising healthcare costs and longer wait times for medical services in developed countries. Uzbekistan, with its rich historical heritage and striving for economic diversification, is actively developing this sector, positioning itself as a regional hub for medical tourism. This research article comprehensively analyzes the current state of medical tourism in Uzbekistan, including the dynamics of inbound and outbound patient flows, the sector's economic contribution, as well as the specifics of healthcare infrastructure and specialized services offered. The paper examines in detail government strategies and legislative initiatives aimed at stimulating the growth of medical tourism. Key challenges are identified, such as the persistent outflow of local patients abroad and quality gaps in medical services, as well as opportunities for sustainable development, including the potential for food specialization and increased digitalization. A comparative analysis is conducted with successful international models, such as India, Thailand, and Turkey, to identify applicable lessons. The research findings form the basis for strategic recommendations aimed at enhancing Uzbekistan's competitiveness in the global medical tourism market and ensuring its long-term growth.

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Medical tourism is defined as the practice of traveling outside one's country of residence for the purpose of receiving medical treatment, surgery, or wellness services.[1]This phenomenon covers a wide range of services, from routine and cosmetic procedures to specialized medical interventions and complex surgeries, including pre- and post-operative care, consultations, diagnostics, rehabilitation and recovery.[3]Historically, people have traveled great distances in search of healing waters and specialized treatments, and today globalization and technological advances are fueling the exponential growth of this sector.[4]

The key drivers of medical tourism are rising healthcare costs and long waiting times for medical services in patients' home countries.[4]Additionally, increasing awareness of alternative medical approaches and the desire for a holistic healthcare experience are playing a significant role.[4]Access to advanced medical infrastructure and highly qualified specialists in recipient countries also attracts patients.[4]Technological advances, particularly telemedicine, have significantly improved patient decision-making and made it easier to consult with healthcare professionals abroad.[3]Patients' ability to research and connect with healthcare providers worldwide has become easier, reducing information asymmetries and increasing transparency in comparing the cost and quality of services.[3]This, in turn, is increasing competition between practices, challenging them not only to offer high-quality services but also to effectively market them and ensure a seamless digital experience, including remote consultations and follow-up care. The COVID-19 pandemic has accelerated the transition to a "contactless" era, signaling a permanent shift in patient expectations regarding digital interactions.

The global medical tourism market was valued at USD 97,311.04 million in 2022 and is projected to reach USD 273,722.42 million by 2032, exhibiting a compound annual growth rate (CAGR) of 10.1%.[3]In terms of patient volume, the market is projected to grow from 21,110.54 thousand patients in 2022 to 71,174.94 thousand by 2032, with a CAGR of 11.8%.[3]The US medical tourism market alone was valued at US$4.58 billion in 2022, with a projected CAGR of 21.0%.[6]

Table No. 1 Global Medical Tourism Market Trends (2022-2032)

Indicator	2022	Forecast for 2032	CAGR (2023-2032)
Market size (USD million)	97,311.04	273,722.42	10.1%
Number of patients (thousands)	21,110.54	71,174.94	11.8%

Key drivers: High healthcare costs, long wait times, technological advances, increased awareness of referrals.

Leading destinations: India, Thailand, Türkiye, Singapore.

Popular specializations: Cosmetic surgery, dentistry, oncology, organ transplantation.

India, Thailand and Türkiye have emerged as key destinations due to their advanced medical infrastructure and cost-effective treatment methods.[4]Thailand is a leader in cosmetic surgery, wellness treatments, orthopedics and infertility treatments.[7]India offers affordable, high-quality services in cosmetic surgery, orthopaedics, infertility treatment and organ transplants.[8]Turkey has emerged as a powerhouse, offering a full range of services including cosmetic surgery, dental restoration, bariatric procedures, IVF and orthopedic care, often combined with luxury hotels and multilingual staff.[9]Medical tourism covers a variety of medical specialties, from cosmetic surgeries to complex procedures such as organ transplants and cancer treatments.[1]

However, significant challenges remain in the sector, including regulatory inconsistencies, ethical dilemmas, concerns about quality assurance, language barriers, cultural differences and issues related to post-operative care.[4]The lack of standardized regulations and quality assurance mechanisms could lead to persistent patient safety risks and legal complications, potentially hindering the industry's sustainable growth. This means that future efforts to develop medical tourism, especially for emerging players like Uzbekistan, should consider the need to adhere to or promote international best practices and, potentially, harmonize regulations to enhance trust and alleviate patient concerns.

The aim of this study is to comprehensively analyze the development of medical tourism in Uzbekistan, assess its current status, identify key government strategies, evaluate its economic contribution, and examine the challenges and opportunities for its sustainable growth.

Research objectives:

- To define medical tourism in a global context and trace its historical evolution in Uzbekistan.
- To quantify the dynamics of inbound and outbound medical tourism in Uzbekistan, including patient origin countries and economic contribution.
- Describe the existing healthcare infrastructure and the range of specialized medical services available to international patients.
- To identify and analyze key government policies and legislative frameworks that support the development of medical tourism.
- To critically assess the main challenges hampering the growth of medical tourism and the opportunities that can be exploited for future development.
- To propose strategic recommendations to promote sustainable medical tourism in Uzbekistan, drawing lessons from successful international models.

The primary data for this analysis were obtained from a carefully curated collection of research materials.[4]These materials include excerpts and summaries from research papers (e.g., ResearchGate, MDPI, Peerian Journal), official government reports (e.g., CDC, WHO, the Ministry of Health of Uzbekistan, the State Statistics Committee), industry market analyses (e.g., Fortune Business Insights, Allied Market Research), and news articles (e.g., bne IntelliNews, RFE/RL, Travel and Tour World). The selection of these sources provides a multifaceted perspective, encompassing global trends, specific country-level data, policy initiatives, and economic indicators.

It's important to note that there are potential discrepancies in the data. For example, the statement that "Dushanbe disputes Uzbekistan's statistics" regarding Tajik medical tourists[18], points to potential issues with data reliability. If neighboring countries dispute figures, this may indicate that the reported data is inflated or based on different definitions or collection methods (e.g., border declarations versus actual hospital records). This has serious implications for policy and planning: if the underlying data is inaccurate, strategies built on it may be flawed. It also points to a lack of data harmonization across countries, which is crucial for the development of regional medical tourism. This report acknowledges this limitation and interprets the statistics with caution.

Qualitative content analysis was used to systematically extract, categorize, and synthesize information from the provided materials. The data was organized according to the IMRAD framework to ensure comprehensive coverage of the research objectives. Information was divided into thematic categories, such as global trends, historical context, current statistics, public policy, infrastructure, specialized services, challenges, and opportunities.

Information from multiple sources was cross-referenced to identify consistent themes, contradictions, and causal relationships. For example, government decrees were associated with a reported increase in medical tourists, while calls were associated with an observed decrease in patient outflows. Quantitative data, such as market value, patient volume, and growth rates, were extracted and compiled to provide a statistical overview.

Interpretive commentary was developed for each section, going beyond simple description to identify key trends, broader implications, and potential future directions. This included asking "why" and "how" questions to establish deeper connections between seemingly disparate data. Many of the contributions, particularly those related to government initiatives or general appeals, represent "soft data" (promoting, aspirational) rather than hard empirical evidence. For example, statements such as "Uzbekistan hopes to become a leader"[14]or that the country "promotes the medical and recreational industry as a sixth industry"[14], indicate strong government intent and

vision. However, this must be critically assessed against actual results, such as the continued outflow of patients abroad.[14]The methodology should make clear the need to distinguish between policy aspirations and measurable impacts, highlighting areas where further empirical research (e.g. patient satisfaction surveys, detailed economic impact assessments) would be useful.

Uzbekistan has seen a significant increase in the number of foreign citizens seeking medical treatment. In the first half of 2023, 32,200 foreign citizens arrived in Uzbekistan specifically for medical services.[20]From January to August 2024, the number of medical tourist visits to Uzbekistan increased by 84% compared to the same period of the previous year.[21]In particular, 57,380 Tajik citizens arrived for treatment during this period, which is 100% more than in the previous year.[18]Other significant countries of origin from January to August 2024 were Kazakhstan (8,542 people), Kyrgyzstan (6,704 people), Russia (1,299 people) and Turkmenistan (672 people).[18]

The dominance of CIS countries in the flow of medical tourists is clear. A significant portion of medical arrivals comes from CIS countries, especially those bordering Uzbekistan. In 2019, almost all medical tourists (55,500 people) came from CIS countries, and in 2020, they came exclusively from CIS countries.[23]In January-March 2024, 93.3% of all foreign arrivals came from CIS countries, although only 1.4% of visitors from the CIS came for medical treatment.[16]For non-CIS countries, only 0.04% of arrivals in January-March 2024 were for medical treatment.[16]This highlights the gap between the ambitions of a "regional center" and a "global leader." While Uzbekistan aspires to be a "leader in Central Asia,"[14]Statistics clearly show that it is primarily a regional center, with the vast majority of medical tourists coming from neighboring CIS countries.[16]The current success is largely due to geographical proximity and visa-free regime[18], affordable prices and the absence of language barriers in the CIS region.[18]To become a "global leader," Uzbekistan needs to attract patients from non-CIS countries, where current numbers are negligible. This requires a different set of strategies focused on internationally competitive quality, accreditation, and targeted marketing beyond its immediate neighbors.

Table No. 2 Statistics of inbound and outbound medical tourism in Uzbekistan (2015-2024)

Year	Inbound medical tourism (thousand people)	Outbound medical tourism (thousand people)	Main countries of origin (entry)
2015	-	-	-
2016	< 37,168	> 55,490	-
2017	Doubled since 2016	Increased	-
2018	Doubled since 2017	Increased sharply	-
2019	55.49	37,168	Mainly CIS (55.5)
2020	-	16.5 (9.5 CIS, 7.0 non-CIS)	Only CIS
2023	43.2 (Tajikistan)[19]	-	-
2023 (1P)	32.2[20]	-	-
2024 (January-August)	57.38 (Tajikistan), 8.542 (Kazakhstan), 6.704 (Kyrgyzstan), 1.299 (Russia), 672 (Turkmenistan)[18]	-	Tajikistan, Kazakhstan, Kyrgyzstan, Russia, Turkmenistan
2024 (January-March)	19.2[16]	-	CIS (93.3% of all arrivals)[16]
2025 (January)	-	4,206[24]	-

Note: Data may be incomplete or have discrepancies between sources.

Despite the ambitious goal of becoming a leader in medical tourism, Uzbek patients still prefer to travel abroad for medical services, even if this entails financial difficulties.[14]The gap between inbound and outbound medical tourism has not narrowed significantly; from 2016 to 2018, outbound tourists outnumbered inbound tourists.[14]In 2019, there were 55,490 inbound medical tourists compared to 37,168 outbound ones.[14]In January 2025, 4,206 Uzbek citizens traveled abroad to receive medical treatment.[24]The preference for treatment abroad indicates a lack of competitiveness and a "significant qualitative gap in medical services" between Uzbekistan and countries receiving Uzbek patients.[14]This also leads to a constant outflow of foreign currency.[14]

The trend of outbound medical tourism, coupled with complaints of a "shortage of specialists" and an exodus of doctors to Russia in neighboring Tajikistan[19], points to a potential "brain drain" problem in the broader context of Central Asian healthcare. If Uzbekistan seeks to attract patients based on "qualified specialists,"[4], it must retain and develop its own medical personnel. The outflow of Uzbek patients[14]and the reported shortage of specialists in neighboring countries[19]point to the problem of talent mobility in the region. If Uzbekistan's own citizens seek medical care abroad due to perceived gaps in quality[14]This undermines trust in the country as a medical tourism destination. This creates a negative feedback loop: perceived lower quality leads to outbound tourism, which can reduce incentives to invest in local talent, further exacerbating the quality gap. Addressing this issue requires not only investment in infrastructure but also strategies for developing and retaining human capital.

The fact that a significant number of people crossing borders indicate "medical treatment" as the purpose of their trip, even if this is disputed by some authorities[19], points to a data collection issue. This means that official statistics on medical tourism may be inflated if based solely on border declarations. People may indicate "medical treatment" to facilitate border crossing or for other reasons. This means that the actual number of bona fide medical tourists seeking complex procedures may be lower, while the number of those seeking basic diagnostics or consultations may be higher. This requires more detailed data collection methods to accurately assess the medical tourism segment and develop specific strategies.

The development of medical tourism in Uzbekistan faces both significant challenges and promising opportunities that determine its current status and future prospects.

Challenges:

- **Patient outflow:**A significant problem is that Uzbek patients still prefer to receive medical services abroad, even if this entails financial difficulties.[14]The gap between inbound and outbound medical tourism has not narrowed significantly, and from 2016 to 2018, outbound tourists outnumbered inbound tourists.[14]This indicates a lack of competitiveness of the local health system and supporting policies.[14]
- **Lack of sustainable management:**The preference of Uzbek patients for treatment abroad suggests that the local healthcare system and supporting policies lack sustainable governance.[14]
- **Minor influence of tourist factors (at the initial stage):**For Uzbek patients considering medical tourism, tourism benefits such as sightseeing or adventure attractions are not necessary; they are merely supplementary or complementary.[14]This means that active promotional efforts emphasizing tourism benefits may not be sustainable for medical tourism in Uzbekistan, at least in its initial stages.
- **Quality gap in health services:**There is a significant gap in the quality of medical services between Uzbekistan and host countries, which encourages Uzbek patients to seek medical tourism abroad.[14]The quality of healthcare in Uzbekistan is generally assessed as low, with many hospitals poorly equipped, unhygienic, and with limited supplies of medications.[38]

- **Low perceived value from information exchange:**Information exchange is only "partially mediated" by perceived value, suggesting that the perceived value of medical tourism is significantly lower or insignificant for Uzbek patients.[14]This points to the need for more effective information dissemination to create value.
- **Investment requirements:**Improving the overall quality of health services requires significant investments that cannot be achieved in the short term.[14]
- **Impact of the COVID-19 pandemic:**The COVID-19 pandemic has halted international travel, including medical tourism, and rapidly shifted the industry to a "contactless" era, limiting full understanding of medical tourists' behavioral intentions.[14]
- **Payment and insurance issues:**Many medical institutions require cash advance payment.[34], which may be a barrier for some international patients.
- **Problems with "soft infrastructure":**Lack of standardized organization of medical care, language barriers and the need to invest in staff training to ensure a seamless patient experience.[4]

Possibilities:

- **High potential niche market:**Medical tourism is a growing niche market with enormous potential as a "sixth industry" of healthcare services, offering unforgettable experiences.[14]
- **An ambitious goal to become a leader:**Uzbekistan aims to become a leader in Central Asia in medical tourism.[14]The government is promoting the medical and recreational industry, combining medical technologies with recreational tourism experiences to stimulate the national economy.[14]
- **State initiatives:**The Government of Uzbekistan is promoting medical tourism through significant legislative and organizational changes based on the Presidential Decree on comprehensive measures to radically improve the healthcare system and the Concept for the Development of the Healthcare System for 2019–2025.[14]
- **Strong influence of medical factors and information exchange:**Medical factors and information sharing were identified as very important factors for behavioral intentions.[14]This suggests that increasing political support for these two variables may promote the development of medical tourism.
- **Selective concentration in medical services:**If the Uzbek government specializes in certain strategic areas of medical services through "selective concentration", there is a good chance of becoming a specialized hub for this area of medical tourism.[14]
- **The role of perceived value:**Patient-perceived value plays a key role in ensuring the sustainable success of healthcare services. Improving the overall quality of healthcare services can increase patient trust and satisfaction, thereby enhancing perceived value.[14]
- **Government initiative in information exchange:**Government initiatives are crucial, especially in the initial stages, to becoming a medical hub for developing countries. The government can ensure easy and reliable access to information, for example, by creating publicly accessible websites for medical tourism, with subsidies for transportation and visa processes.[14]
- **Public-private partnership (PPP):**The most important factors are medical factors, and therefore PPP between all stakeholders should actively participate in the development of advanced medical services for sustainable management.[14]
- **New offers during the pandemic:**Offering free vaccines to international tourists could stimulate medical tourism.[14]If a country guarantees safer and better tourism incentives coupled

with medical treatment, patients from developing countries may consider protected medical tourism.

Table No. 3 Key challenges and opportunities for the development of medical tourism in Uzbekistan

Category	Challenges	Possibilities
Domestic Demand/Outflow	The ongoing outflow of Uzbek patients abroad is due to a qualitative gap and lack of competitiveness.[14]	Retaining domestic patients by improving the quality and availability of local services.
Quality of services	A significant gap in the quality of medical services compared to leading countries.[14]	Selective focus on strategic areas of medicine to achieve excellence.[14]
Infrastructure	Poor quality equipment, unhygienic conditions in some public hospitals.[38]	Modernization of infrastructure and investment in high-tech equipment.[26]
Management and Politics	Lack of sustainable management and ineffectiveness of existing measures.[14]	State initiatives, legislative framework and support (visa facilitation, investments, registry).[18]
Economy	Outflow of foreign currency due to outbound tourism.[14]	Significant economic contribution through income and job creation.[20]
Perception/ Information	Low perceived value of information, need for strong promotion.[14]	Strengthening information sharing and marketing strategies.[14]
Human capital	Shortage of specialists, outflow of medical personnel to neighboring countries.[19]	Investments in medical education and development of qualified personnel.
Patient experience	Language barriers, cultural differences, lack of standardized care.[4]	Development of "soft infrastructure": staff training, translation services, comprehensive service packages.[40]

The development of medical tourism in Uzbekistan is driven by a complex interplay of internal and external factors. On the one hand, global trends, such as rising healthcare costs and long waiting lists in developed countries, are creating a favorable environment for the emergence of new medical tourism destinations.[4]Technological advances, particularly in telemedicine, are increasing patients' ability to search for information and receive consultations remotely, which in turn is contributing to the rise of medical tourism.[3]In this context, Uzbekistan, with its relatively affordable prices for medical services[23], can offer an attractive alternative. However, simply offering lower prices is not enough. Global experience shows that successful medical tourism destinations such as India, Thailand, and Turkey offer a comprehensive value proposition, encompassing not only economic benefits but also high quality and safety standards, advanced infrastructure, and qualified specialists.[4]This means that Uzbekistan needs to not only compete on price, but also ensure high quality of care, patient safety, and a culturally sensitive environment.

On the other hand, domestic factors play a decisive role in Uzbekistan. The government is actively promoting medical tourism as a strategic "sixth industry" of the economy.[14]Adoption of presidential decrees and the Concept for the Development of the Healthcare System for 2019–2025[14]demonstrates political will and commitment to creating the necessary legislative framework and organizational changes. Simplification of visa procedures and the creation of a unified register of medical institutions[18]are concrete steps to reduce administrative barriers and increase transparency for foreign patients.

However, despite these efforts, there continues to be an outflow of Uzbek patients abroad[14]is a serious obstacle. This phenomenon indicates a significant qualitative gap between local medical services and those available in foreign countries.[14]If citizens of a country striving to become a medical tourism hub choose to seek treatment abroad, this undermines trust in the local healthcare system. This also leads to a continuous outflow of foreign currency, reducing the net economic impact of medical tourism development.[14]To overcome this, it is necessary not only to invest in modernising infrastructure, but also to focus on upgrading the skills of medical staff and improving the overall quality of services for all patients.

Uzbekistan's historical heritage in the field of medicine[10]represents a unique asset that can be used to create a distinctive brand in medical tourism. The combination of modern treatment methods with traditional wellness practices could attract a niche of patients seeking a holistic approach to health. However, for this to become a reality, current issues with the quality and accessibility of services, particularly in public institutions, must be overcome.[38]The development of a "dual healthcare system," where private hospitals cater to international patients while public ones remain underfunded, could exacerbate inequalities and fail to improve overall standards.

An analysis of successful medical tourism models such as India, Thailand, Turkey, and South Korea offers valuable lessons for Uzbekistan. These countries achieved success thanks to a combination of several key factors.[8]:

- **Availability and quality:**All of these countries offer healthcare at significantly lower prices than Western countries, while maintaining high quality standards.[8]India, for example, is known for its advanced medical infrastructure, qualified doctors and accredited hospitals offering complex procedures at competitive prices.[8]Thailand attracts millions of medical tourists annually thanks to its high-quality healthcare, particularly cosmetic surgery and wellness treatments, at prices 50-70% lower than in the West.[7]
- **Specialization and branding:**Turkey has successfully positioned itself as a hub for a wide range of procedures, from hair transplants to bariatric surgery, often offering them alongside luxury services and aggressive international marketing, such as the "Heal in Türkiye" initiative.[9]South Korea has become a leader in the field of cosmetic surgery, leveraging its technological advancements and reputation in the field.[9]
- **Government support:**All of these countries actively support medical tourism through government initiatives, visa facilitation, and promotion of their medical facilities.[7]
- **Integration with tourism:**Successful models often integrate medical services with tourism experiences, offering patients the opportunity to combine treatment with relaxation and cultural immersion. This includes service packages that include accommodation, transportation, and rehabilitation activities.[9]

For Uzbekistan, these lessons highlight the need to:

- **Prioritize quality over quantity:**Instead of trying to compete across the board, Uzbekistan should focus on "selective concentration" in a few strategic areas where it can achieve excellence and offer truly competitive services.[14]Dentistry, cosmetic surgery and traditional medicine are already strong points[15]and can become the basis for further development.
- **Strengthening human capital:**Outflow of medical specialists[19]and the preference of local patients for treatment abroad[14]They point to the need for significant investment in medical education, advanced training, and the creation of attractive working conditions for physicians. Without highly qualified personnel, it is impossible to meet international quality standards.
- **Development of "soft infrastructure":**In addition to modern equipment, a patient-centered approach is critical. This includes staff training, providing interpreter services, creating

seamless processes from arrival to post-operative care, and ensuring transparency of information and financial terms.[39]

- **Effective Marketing and Branding:**Uzbekistan needs to develop targeted marketing strategies that highlight its unique advantages, including historical heritage and accessibility, and promote them in international markets outside the CIS.[26]

The development of medical tourism in Uzbekistan is a strategic direction actively supported by the government with the aim of diversifying the economy and enhancing the country's international prestige. Significant growth in inbound medical tourism has been observed, particularly from neighboring CIS countries, demonstrating Uzbekistan's potential as a regional medical hub. Government initiatives such as visa facilitation, the creation of a unified registry of medical institutions, and investment incentives are laying the foundation for further growth.

However, despite these successes, a significant challenge remains: a persistent outflow of Uzbek patients abroad, highlighting gaps in the local healthcare system and the need for further investment. To achieve sustainable development and realize its ambitious goal of becoming a global leader, Uzbekistan must focus on improving the overall quality of medical services, developing niche specialties, strengthening human capital, and enhancing the patient experience. Lessons learned from leading medical tourism countries such as India, Thailand, and Turkey highlight the importance of a comprehensive approach combining accessibility, high quality, effective marketing, and the integration of medical services with tourism opportunities. Implementing these strategic recommendations will allow Uzbekistan not only to attract more international patients but also to build trust in its own healthcare system, ensuring long-term and sustainable growth of the medical tourism sector.

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