

NHI as Catalyst

Healthcare Infrastructure Investment in South Africa

“South Africa’s National Health Insurance Act has raised fundamental questions about how healthcare will be funded and delivered. Government faces the challenge of upgrading public facilities, while private care remains unaffordable for most. The opportunity- and necessity, lies in collaboration between public and private players, with property development, technology, and investment at the centre.”



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Fireside Chat: Healthcare Property Investment in the Era of NHI

Healthcare Infrastructure Investment in South Africa

Problem!

Health spend: 8.3% of GDP – but unequal impact.
16% population - private medical schemes;
84% rely on public sector.

Doctor density: < 0.8 per 1,000 people (below global norms).

Solution?

Solution:

Collaboration
Infrastructure Technology
Human Capital.

Hub-and-spoke property model:

Regional diagnostic & surgical hubs
Linked to community clinics public facilities.

Healthcare Infrastructure Investment in South Africa

Technology

Technology as a multiplier: Telemedicine,
AI diagnostics,
National digital backbone.

NHI

NHI as strategic purchaser: Contract private capacity where public is weak.

Measurable

Measure outcomes: Reduce waiting lists,
Faster diagnostics,
Improved outpatient access
Improved health care outcomes.

Collaboration

Future: Public + Private Collaboration - with Technology and Infrastructure at the Core.



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Key message

Examples

Theme 1: Property + Technology/AI Opportunities

Healthcare property is evolving — new facilities must be smart, tech-enabled, and future-proof.

- Digitally enabled clinics with telemedicine hubs - *Remote access*
- AI diagnostic centres serving multiple facilities - *Centralised*
- Pharmaceutical manufacturing/distribution hubs using robotics and AI - *Smart logistics*

Question 1

“How can we reduce the physical footprint of care. and what does this mean for the property sector?”

Question 2

“What types of facilities will we need to develop to support this hybrid model of digital and physical care?”

Key message

Theme 2: Funding & Delivery Models

The NHI cannot be delivered by government alone. New financing and partnership models are essential.

Question 1

“Which property development opportunities do you see as the most urgent-hospital upgrades, new clinics, or specialised centres — and how can private capital play a role?”

Question 2

“What models (PPP, blended finance, concessions) can help attract institutional investors into healthcare property, despite fiscal constraints?”



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Summary

“The NHI presents both a challenge and an opportunity. To succeed, South Africa will need not only new ways of funding health services but also develop new facility types, tech-enabled, flexible, and cost-effective. Property developers, healthcare operators, and investors have a chance to shape the future of African healthcare together.”

“This is just the start of the conversation. I encourage you to further engage with us after this session to explore partnerships and real opportunities.”



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