



CONVENCIÓN

EUROPEA DE LA DEPENDENCIA

LA ATENCIÓN A LAS PERSONAS EN SITUACIÓN DE DEPENDENCIA EN EUROPA

SITUACIÓN ACTUAL
Y PROPUESTAS DE FUTURO



EUROPEAN

CONVENTION ON LONG-TERM CARE

ATTENDANCE FOR PEOPLE IN NEED OF LONG-TERM CARE IN EUROPE

CURRENT SITUATION
AND PROPOSALS FOR THE FUTURE

MADRID 2026



ECONOMÍA Y SALUD
FUNDACIÓN

ROUND TABLE I. BENEFICIARIES AND BENEFITS: TOWARDS A FAIR AND PERSON-CENTRED EUROPEAN FRAMEWORK

LONG TERM CARE IN EUROPE Demand, expenditure and workforce: where are we heading?

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European Confederation of Care Homes Organizations (ECHO)



💡 ECHO members provide residential care for independent and dependent elderly people in nursing and retirement homes, day care centres, service flats, dementia and rehabilitation centres, home care and telemedicine

The European Confederation of Care Home Organisations (E.C.H.O.)

whose Central Office is located in Brussels, pursues mainly the following objectives:

- | fair and reasonable terms among care providers in long term care sector,
- | high quality standards throughout Europe and a simultaneous reduction in bureaucracy,
- | recognition of elderly care sector as a productive economy factor.



In numbers

> 16,000

care providers/organisations represented

> 3,500,000

of elderly people in nursing homes, rehabilitation centers, home care, day care centers, telemedicine services

350,000

Number of employees

1. Demand is rising... and quickly

30.8m

people potentially needing LTC,
2019



+23.5%

38.1m

people potentially needing LTC,
2050

What this means

Population ageing is the main structural driver.

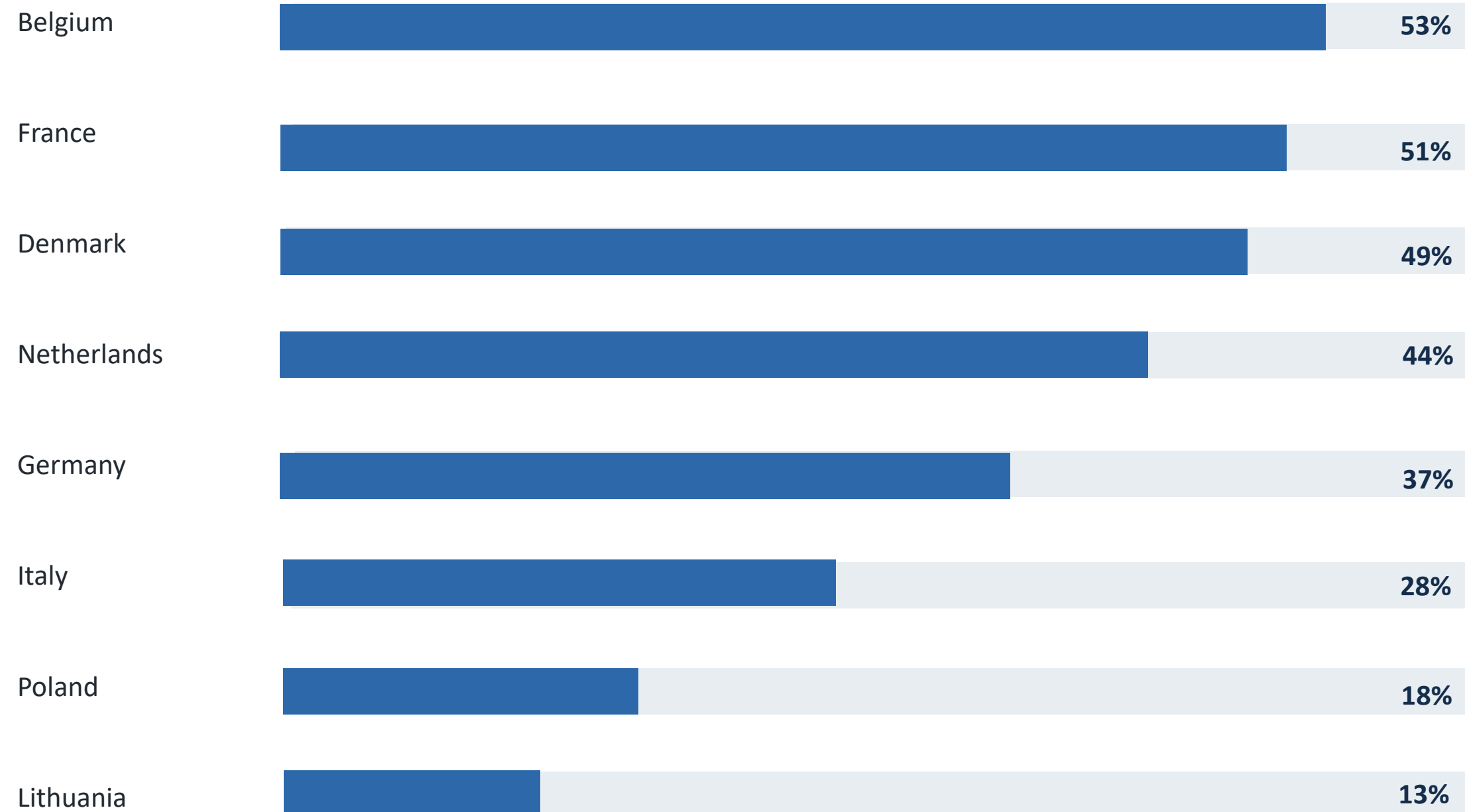
Demand is not just about the number of older people: disability, chronic conditions and patterns of informal care also matter.

The implication is a sustained increase in demand for formal LTC capacity.

2. Coverage is highly uneven

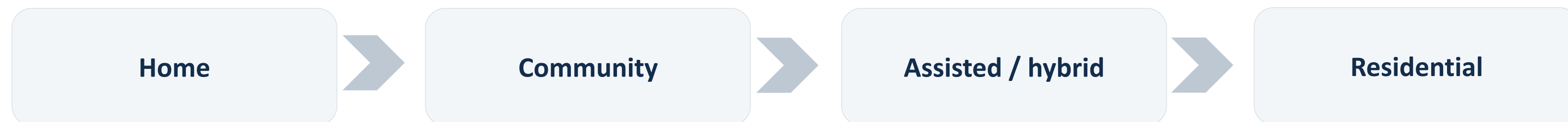
27%

average estimated formal-care
coverage among older people with
LTC needs



Definitions and data sources differ, Europe does not have one LTC model, coverage remains uneven.

3. Care is shifting towards home, but not away from residential care



The European direction of travel is diversification: home, community, hybrid and residential settings need to work as a continuum.

4. Expenditure will rise even before considering stronger coverage



Why this matters

The projection reflects demographic and health-status assumptions; it is not a forecast of a single policy choice.

The Commission also models higher spending under scenarios with stronger coverage/cost convergence.

Countries start from very different spending levels and service mixes.

5. The workforce is the binding constraint

3.1m

EU LTC workers in 2023

1.5%

of total EU employment

87%

of LTC workers are women (OECD)

14→21%

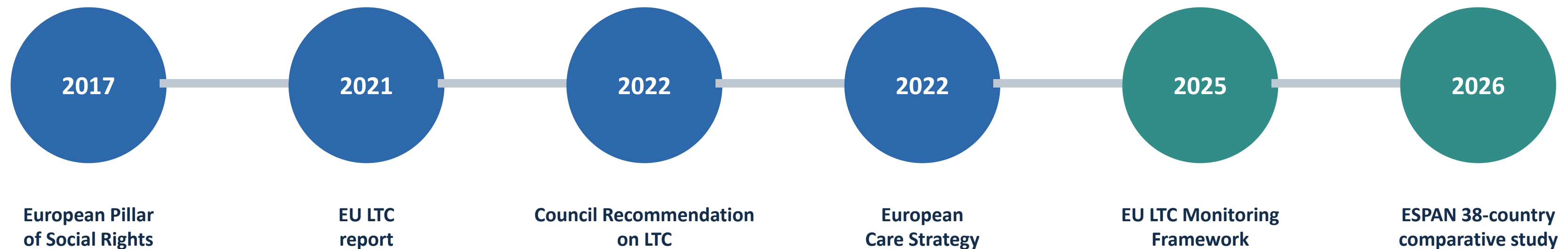
foreign-born share, 2014→2024

5.0 LTC workers per 100 people aged 65+ in 2023

OECD average across 31 countries and broadly stable over the previous decade

The challenge is not simply recruiting more people: retention, working conditions, skills, pay, migration and productivity all matter. ECHO presented its set of recommendations for immediate EU Intervention to EU Commissioners.

6. EU policy: from principles to monitoring



The EU agenda increasingly combines access, affordability, quality, workforce and person-centred care with indicators intended to track implementation. Only a coordinated, binding, and well-funded European response can ensure the ethical and economic sustainability of long-term care and uphold Principle 18 of the European Pillar of Social Rights — the right to affordable, high-quality long-term care.

Immediate policy actions proposed:

1. **EU Professional Attractiveness Fund for LTC**, integrated in ESF+, to cofinance fair wages and social benefits (e.g. parental leave).
2. **“Care-Skills” Accelerated Programme (AEP)** to retrain unemployed workers and upskill current staff.
3. **Talent Partnerships with third countries** to regulate ethical and legal migration of LTC professionals.
4. **Support for telemedicine and home care integration**, reducing institutional burden and improving efficiency.

7. What does this mean for care homes?

European trend	What the data show	Relevance for care homes
Rising demand	More people will require LTC, including complex care.	Capacity and case-mix matter.
More home/community care	Residential care remains one part of a wider continuum.	Integration and transitions matter.
Workforce pressure	LTC is labour-intensive and increasingly reliant on international recruitment.	Recruitment, retention and skills matter.
Fiscal pressure	Public expenditure is projected to rise, while countries face affordability constraints.	Cost, quality and funding models matter.

The policy question is increasingly about the right mix of settings, not “home care OR residential care”.

8. Three numbers to take away

38.1m

people potentially needing LTC by 2050

2.6%

projected EU public LTC spending / GDP by
2070

3.1m

EU LTC workers in 2023

More people. More expenditure. More pressure on the workforce.

The central challenge is expanding capacity while maintaining quality, affordability and a sustainable workforce.



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GRACIAS
THANK YOU

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