

THE LONG-TERM CARE MONITORING FRAMEWORK

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POLICY CONTEXT

LTC RECOMMENDATION

2022 Council Recommendation on access to affordable high-quality long-term care:

- Key element of the European Care Strategy
- Calls on Member States to **improve access to affordable, high-quality long-term care for all people who need it**, as well as to **ensure a national framework for data collection and evaluation**, underpinned by relevant indicators, where relevant and possible disaggregated by sex and age, and the collection of evidence, including on gaps in LTC provision. It is also recommended that Member States communicate to the Commission, within 18 months (i.e. by June 2024) from the adoption of the recommendation, the set of measures taken or planned to implement it
- Welcomed the Commission's intention to
 - **monitor progress in implementing this recommendation** in the context of the European Semester and the Social Open Method of Coordination
 - work with the Social Protection Committee to **establish a framework of indicators for monitoring the implementation of this Recommendation**, building on the joint work on common indicators on long-term care and other monitoring frameworks to avoid duplication of work and limit the administrative burden

SOCIAL PROTECTION COMMITTEE'S INDICATORS SUBGROUP

The **Social Protection Committee (SPC)** is an advisory policy committee to the Ministers in the Employment and Social Affairs Council (EPSCO). The SPC is established with a Council decision under article 160 of the Treaty on the Functioning of the EU. The SPC uses as its main policy framework the social Open Method of Coordination (OMC), which aims to meet EU goals in the social policy area.

The SPC has one permanent subgroup - the **Indicators' subgroup (ISG)**, which is responsible for developing and defining EU social indicators to monitor Member States' progress towards the objectives underpinning the social OMC.

Over the last two years, the SPC ISG has been developing an **EU monitoring framework for the Council recommendation on access to affordable high-quality long-term care**. On December 2024, the SPC-ISG adopted a version 0 of this monitoring framework. The goal is to published this version in early Spring.

STRUCTURE OF THE MONITORING FRAMEWORK

SCOPE OF THE LTC RECOMMENDATION

Definition of Long-term care:

'long-term care' means a range of services and assistance for people who, as a result of mental and/or physical frailty, disease and/or disability over an extended period of time, depend on support for daily living activities and/or are in need of some permanent nursing care. The daily living activities for which support is needed may be the self-care activities that a person must perform every day, namely activities of daily living, such as bathing, dressing, eating, getting in and out of bed or a chair, moving around, using the toilet, and controlling bladder and bowel functions, or may be related to independent living, namely instrumental activities of daily living, such as preparing meals, managing money, shopping for groceries or personal items, performing light or heavy housework, and using a telephone;

Target group: all people in need of LTC, with standard reference group 65+

Break-downs: age and gender, socio-demographic and regional where available

DIMENSIONS OF LTC RECOMMENDATION

Monitoring of the LTC recommendation will need to cover all its dimensions, notably:

- Adequacy of LTC services
- Availability of LTC services
- Quality of LTC services
- Formal workforce in the sector
- Support for informal carers

THREE LEVELS OF INDICATORS

Following the example of other monitoring frameworks, it is proposed to use **three types of indicators**:

- **Performance indicators:** reflect progress towards the key objectives of the LTC recommendation. They are quantitative and can be based on comparable EU level indicators, or on national level indicators
- **Policy levers:** indicators on Member States policies and will show qualitative information. They will mostly show in a yes/no category whether the specific provisions of the LTC recommendations are followed. In that sense, the existence of appropriate policy levers would positively influence quantitative performance indicators.
- **Context information:** recall the demographic and socio-economic context in which LTC systems operate, but they are not directly reflecting progress in the implementation of the LTC recommendation. Context information could be quantitative and/or qualitative.

KEY DATA SOURCES

Administrative data:

- Non-expenditure health statistics
- Expenditure data on LTC (System of Health Accounts)
- The Ageing report
- OCDE framework based on stylised cases of LTC needs
- European Statistics on Accidents at Work (ESAW)

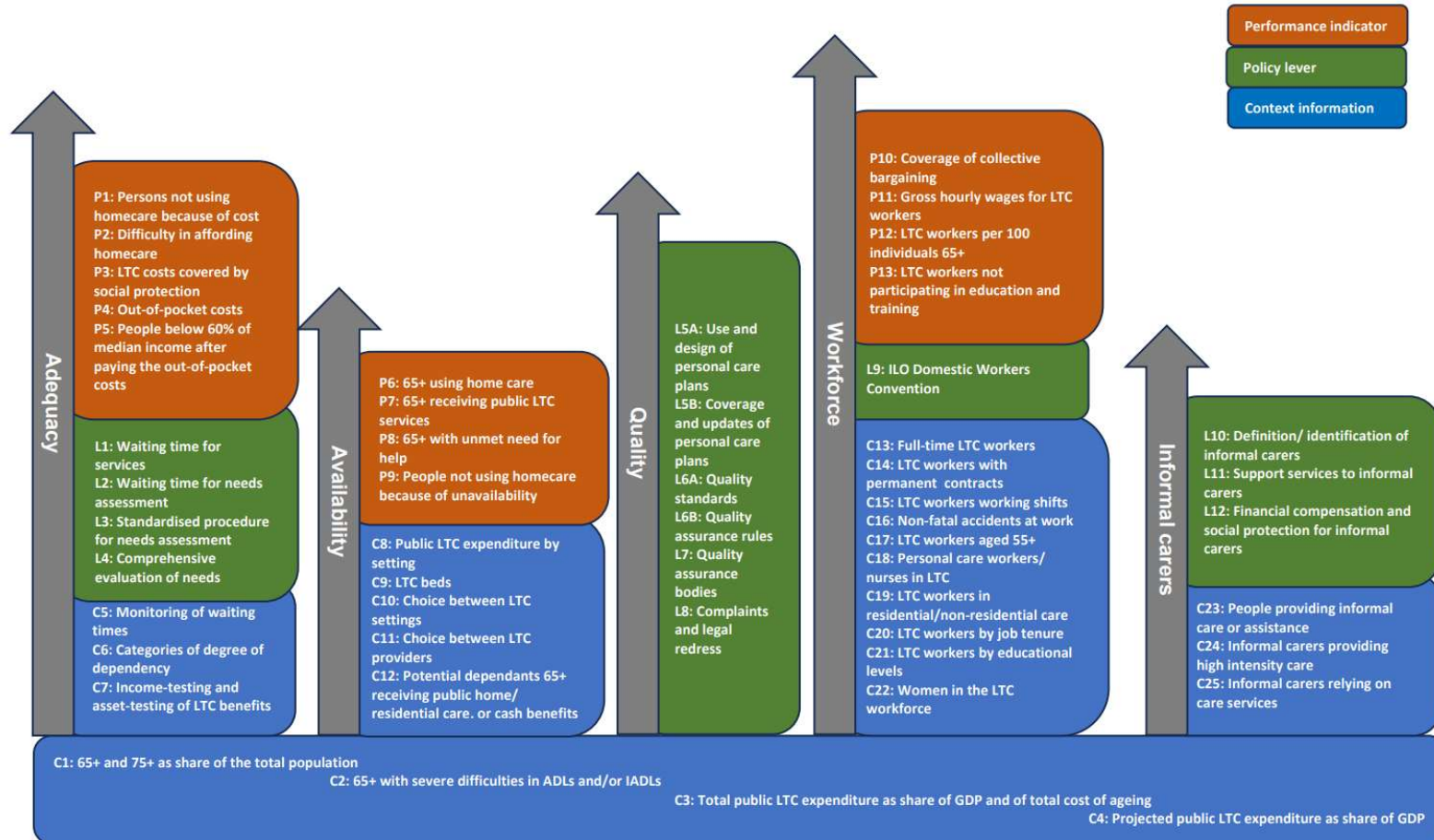
Survey data:

- European Health Interview Survey (EHIS)
- EU Statistics on Income and Living Conditions (EU-SILC)
- EU Labour Force Survey (EU-LFS)
- Structure of Earnings Survey (SES)
- Survey on women's and men's engagement in unpaid care, individual and social activities (CARE)

Data concerning policy and legal framework for LTC:

- Mutual Information System on Social Protection (MISSOC)
- SPC-ISG validation

THE OVERALL MONITORING FRAMEWORK



50 indicators across five dimensions

- 13 performance indicators
- 12 policy levers
- 25 context information items

ADEQUACY

It is recommended that Member States ensure the adequacy of social protection for long-term care, in particular by ensuring that all people with long-term care needs have access to long-term care that is **timely, comprehensive and affordable**

- **Timeliness:** three indicators related to maximum waiting time for needs assessment and service provision
- **Comprehensiveness:** three indicators related to standardised procedure for LTC needs assessment and clear categories of degrees of dependency and to comprehensive evaluation (coverage) of LTC needs
- **Affordability:** six indicators related to cost of LTC services, difficulties to afford the cost, coverage of cost by public social protection, and means-testing of LTC benefits

AVAILABILITY

The availability of LTC is guaranteed by an alignment of the offer of long-term care services to long-term care needs, providing a balanced mix of LTC options and care settings to cater for different long-term care needs and supporting the freedom of choice, and participation in decision-making, of people in need of care, developing home and community-based care, and the closing territorial gaps.

- **Balanced mix of LTC options:** four indicators related to expenditure by care setting, number of beds available, and existence of choice between care settings and providers
- **Home and community-based care:** four indicators related to use of care
- **Territorial gaps:** one indicators related to availability of LTC by degree of urbanization

QUALITY

Member States are recommended to ensure **high quality for long-term care**. Care should be person-centered and integrated, there must be quality standards, and protection against abuses and neglect.

- **Person-centered:** one indicator related to use of personal care plans
- **Quality standards:** two indicators related to the existence of quality standards and quality assurance bodies
- **Protection against abuses:** one indicator related to procedures for complaints

WORKFORCE

The Council Recommendation on LTC sets out several recommendations to improve the situation for workers employed in long-term care in European Member States, specifically regarding quality employment, fair working conditions, improving professionalization of LTC workers, and addressing skills needs and labour shortages

- **Fair working conditions:** seven indicators related to wages, collective bargaining, type of contract and working conditions
- **Skills needs and labour shortages:** eight indicators related to composition of workforce and participation in skills training

INFORMAL CARERS

The LTC Recommendation sets out guidance to improve the situation for informal carers in Member States, specifically to identify informal carers and support them in their care giving activities

- **Identification of informal carers:** two indicators related to number of informal carers
- **Support for informal carers:** four indicators related to existence of support and recognition of informal carers

FUTURE DEVELOPMENTS

FURTHER DEVELOPMENTS

Work of the **Task Force for LTC statistics led by Eurostat**

- TF LTC established in February 2023, will conclude its work at the end of 2025
- Composition: thirteen countries, plus international organizations and agencies and Commission services as observers
- Product: methodological guidelines for EU statistics on LTC, including on the estimation of the population in need of LTC, LTC workforce, informal carers, and LTC expenditure and recipients.

Upon finalization, the COM will analyze implications for the LTC monitoring framework and propose if needed adaptations to be discussed and agreed with ISG.

FURTHER DEVELOPMENTS

Additional data sources and indicators to be explored

- Persons with LTC needs:
 - Inclusion of institutional households in EHIS
 - Use of SHARE data (Survey of Health, Ageing and Retirement in Europe)
- Availability, quality and timeliness of LTC services
 - Inclusion of new variables on people in need of LTC (i.e. the number of hours of formal care or receipt of informal care) in EHIS wave 4, available 2027
 - Leveraging upcoming OECD work to measure quality and the territorial inequalities in accessing LTC
 - Exploring the possibility of collecting data on waiting times
- LTC-workforce related matters
 - Accidents at work: Further work with ESTAT on ESAW data regarding combining NACE with ISCO to allow for a more granular insight by job profile
 - Use of data from the Labour Force Survey to underpin an indicator on wages
 - Potential use of EU-OSHA data to monitor working conditions and occupational risks for LTC workers
 - Data on involuntary part-time or temporary work
 - Inclusion of domestic workers supporting those with LTC needs for a more holistic overview of the sector

NEXT STEPS

Publication of the version 0 of the Monitoring framework: expected in early Spring

The monitoring framework is the **analytical backbone of the future EC and EC-SPC reports on LTC:**

- Commission report to the Council on the **implementation of the LTC Recommendation (2027)**
- EC-SPC **joint report on pension adequacy and LTC (2027)**
- Country analysis in the context of the **European Semester** (important role of the ECFIN-led monitoring of fiscal sustainability concerns related to ageing)

It is important that civil society organizations, social partners and other relevant stakeholders actively use this framework, not only for EU-level analysis, but also for country-level work.

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FRAMEWORK**

THANK YOU