



Labour market access and workforce challenges for professional carers in Europe

Eszter Zolyomi

EUROPEAN CENTRE FOR SOCIAL WELFARE POLICY AND RESEARCH

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Outline

- ❖ Why the LTC workforce matters
- ❖ Workforce challenges and key drivers
- ❖ Access to the labour market and recruitment
- ❖ Working conditions and job quality
- ❖ Conclusions and policy priorities

Why an Adequate and Skilled Care Workforce is a Policy Priority?

- Demographic ageing, longer life expectancy, more complex care needs (rising prevalence of dementia, frailty and multimorbidity)
- Fewer informal carers: lower fertility rates, smaller households, increased labour force participation among women
- Increasing demand for long-term care



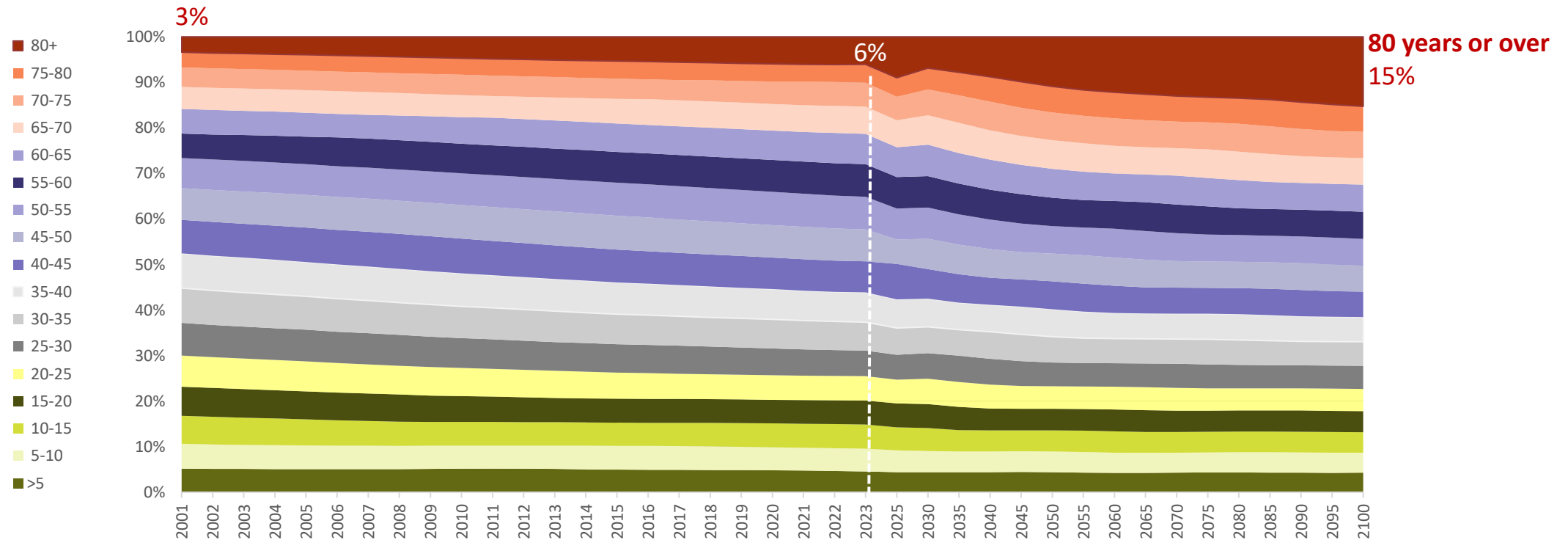
- **Inclusive, person-centred & high-quality care**
- **Healthy ageing, independence, quality of life**
- **Sustainable health and care systems**



Europe's demographic transition

Ageing is accelerating, particularly among the 80+ population

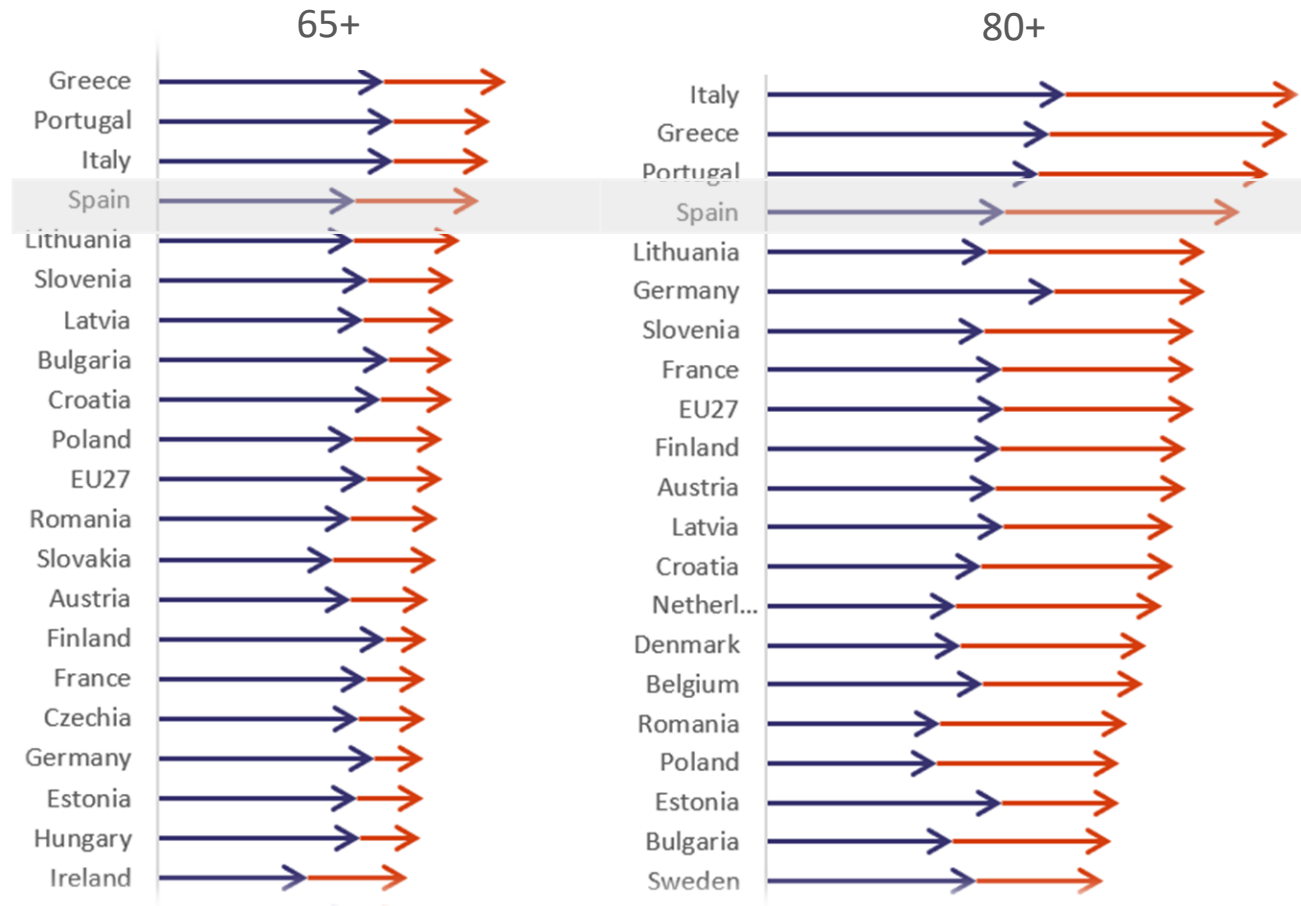
Composition of the EU-27 population by age group (actual + projections), 2001-2100



Source: Eurostat, Kalavrezou et al., 2025

Europe's demographic transition

Some countries are facing greater pressures sooner



- Southern European countries, including Spain, have already one of the highest shares of 65+ (20% in ES) and 80+ (6% in ES) populations in the EU
- Projections to 2050 indicate that these countries will continue to lead in this demographic category

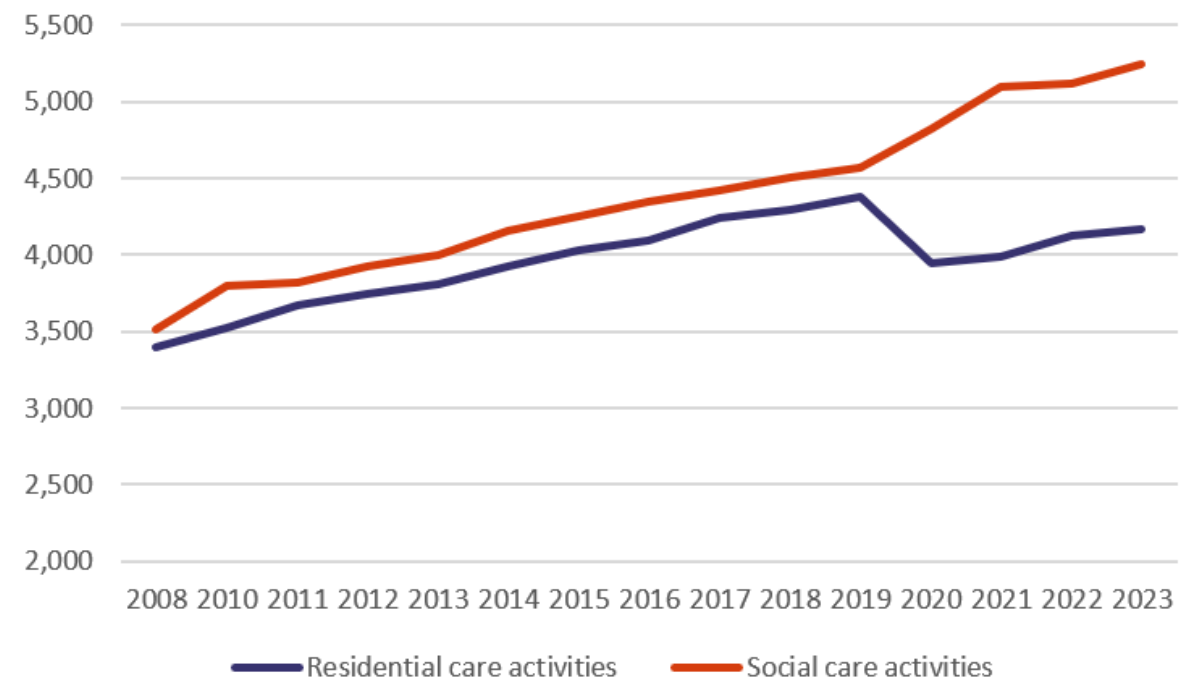
Source: Eurostat, Kalavrezou et al., 2025

Workforce challenges

LTC workers represent a growing share of the labour force

- 6.9 million people in 2008 to 9.4 million in 2023 across the EU (4.7% of total labour force)
- Residential care: +18.3%
- Community care (social work activities without accommodation incl home-based care services): +49.2%
- More growth is needed due to rising demand

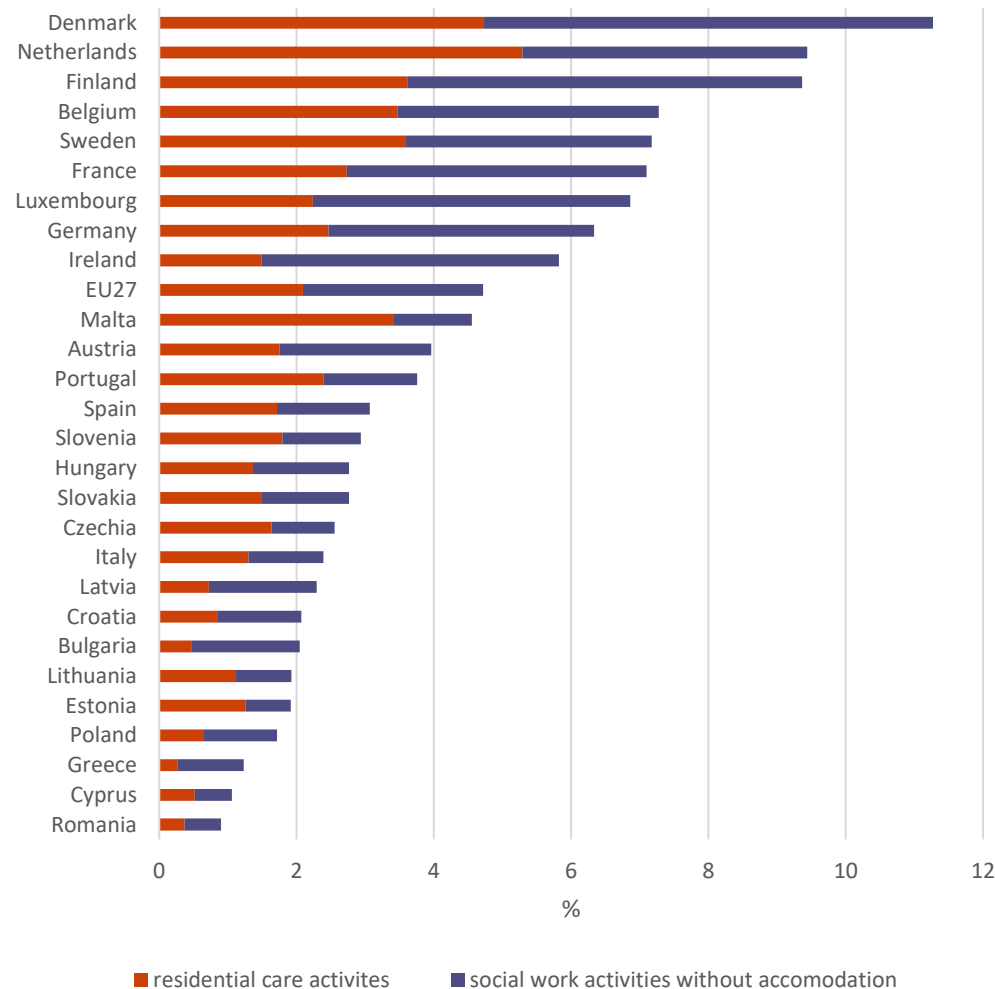
Number of persons employed under the care services sector (thousands), EU-27, 2008-2023



Source: Eurostat LFS, Kalavrezou et al., 2025

Workforce challenges

Workers in the primary sectors of LTC as a % of the total workforce



- Significant cross-country differences: ~10% in DK, NL, FI; <1% in PL, EL, CY, RO
- Driven by supply-side dynamics and country-specific care provision patterns (balance btw formal and informal care)
- Countries with smaller LTC workforces may face higher unmet care needs and incur higher indirect costs through greater reliance on informal care or undeclared labour

Source: Eurostat LFS, 2023, Kalavrezou et al., 2025

Workforce challenges**Comparative European patterns**

Model	Countries	LCT characteristics	Workforce issues
Nordic	E.g., Sweden, Denmark, Netherlands	High public expenditure on LTC; low intensity but widespread access to informal caregiving; limited cash-for-care benefits and high provision of care services	Larger public LTC sector, higher staffing levels, but shortages persist
Continental	E.g., Austria, Germany, France	Medium public expenditure on LTC; medium intensity of informal caregiving; cash-for-care benefits and medium provision of care services	Regional variation, increasing reliance on migrant care workers
Southern	E.g., Italy, Spain, Greece	Medium to low public financing on LTC; high intensity informal caregiving; cash-for-care benefits and generally low provision of care services	Smaller formal care workforce, regional variation, privately employed migrant care workers
Eastern	E.g., Hungary, Poland, Romania	Medium to low public financing on LTC; high intensity informal caregiving; low provision of cash-for-care and care services	Smaller formal care workforce, migration of care workers “care drain”

Workforce challenges

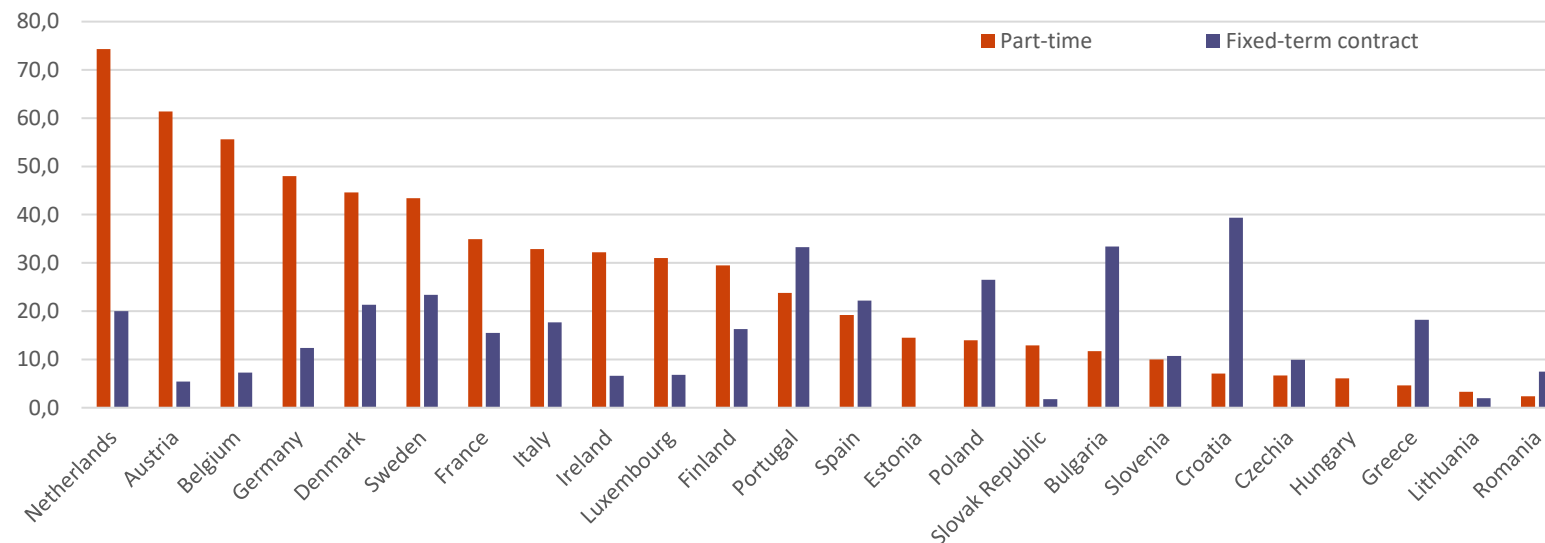
LTC workforce – largely female, ageing and increasingly reliant on migrant workers

- Gender segregation: over 80% of LTC workers in the EU are women → pay, status, recognition
- Older and “Ageing” workforce: 38% (LTC) aged 50+ (34% all workers)
- Increasing reliance on migrant workers esp. in domestic live-in care, often unregulated and undeclared
- Varying levels of professionalisations with diverse qualifications (and tasks) across Europe: residential care workers, home-care workers, personal care workers, nurses, nursing assistants, home helpers (cleaning, cooking), live-in carers
- Need for policies that improve recruitment, retention, skills, and working conditions

Access to the LTC labour market

Strengthening recruitment into long-term care

Key challenges	Policy responses	Examples
Limited pathways into LTC education & training	Expanding VET, training capacities, accessible entry routes, links btw education/training providers and employers	Care scholarships (AT), Modern Apprenticeships (Scotland)
Matching to evolving care needs	Updating curricula incl. person-centred care, dementia care, communication and digital skills, team-work	Nursing Professions Act in DE, Multi-discpl. team & digital skills in FI
Access to upskilling & CPD	Regular in-service and competence-building programmes, life-long learning opportunities	Competence Lift in NO: funding for municipalities to upskill LTC workers
Weak career pathways	Competency-based career ladders, qualifications linked to pay and responsibilities, transferable competencies	Care certificate (e.g., England), Specialist roles (e.g. dementia care coordinators) in SE
Barriers for new entrants & career changers	Flexible learning pathways, apprenticeships/work-based training, recognition of prior learning,	Apprenticeships, paid training & qualifications paths (e.g., AT, CH)
Barriers for migrant workers	Recognition of foreign qualifications, language & integration support, administrative procedures, ethical recruitment	Ethical code in Flanders, Simplified qualification process & reqrm in LU

Working conditions**Low pay and non-standard employment is common in the LTC sector****Share of LTC workers on part-time or fixed-term contracts, 2023 or nearest (%)**

- Part-time and fixed-term contractual arrangements can facilitate labour market access, but often associated with lower job security, fewer training and career development opportunities, and reduced social protection
- Coupled with low wages they hinder recruitment and retention of LTC workers

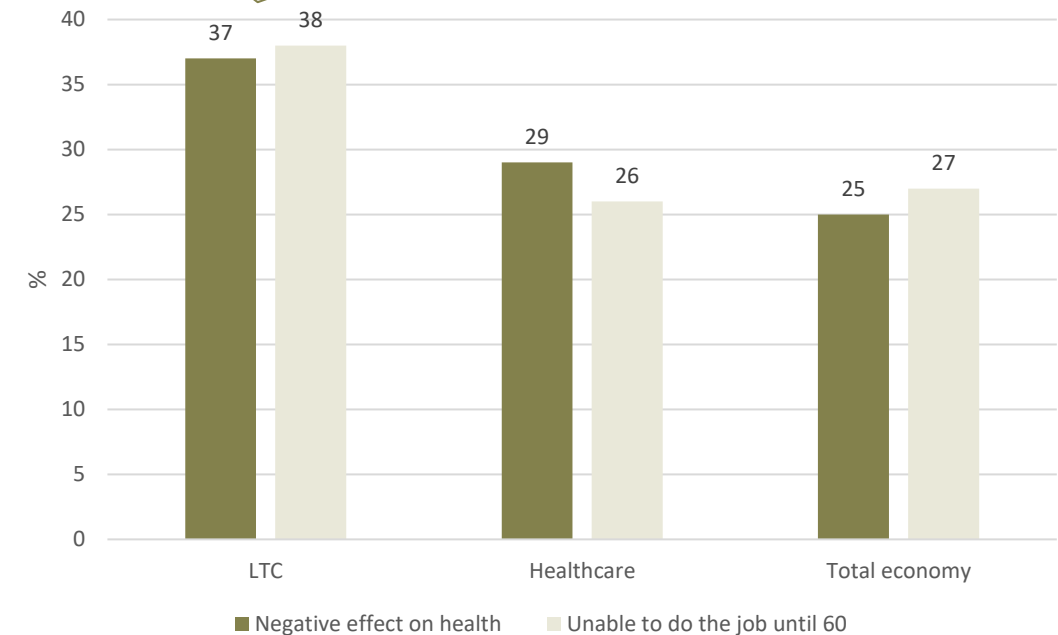
Source: OECD, 2025

Working conditions

Rewarding, but physically and emotionally demanding work

- Physically intensive tasks (lifting, assisting care recipients), exposure to infections
- Emotional strain, mental health challenges esp. for live-in carers
- Irregular working hours, short notice work, shifts, disrupted sleep schedules
- Worse physical and mental health outcomes compared to the general population and high risk of social exclusion
- Insufficient social recognition, despite essential contributions

A large share of LTC workers in the EU report that their work negatively affects their health and question whether they can remain in the profession long term



Source: Eurofound, EWCS 2020

Trends to improve quality of working conditions

- **Wage increases**, education and training opportunities (e.g. AT, DK, ES, SE)
- **Recruiting** on a global level: which implications? (e.g. DE, AT, NO)
- New **organisational models**: moving away from assembly-line care work towards more autonomy, more person-centredness and holistic care (e.g. BE, DK, ES, NL); reduced working time (AT)
- **Retaining and regaining**: Age management in LTC services
- **Raising quality standards** (e.g. staffing levels) and using quality development as incentive to improve working conditions (e.g. BG, CY, DE, FI, LU, LV)
- **Use of smart technologies** to reduce administrative burden (e.g. DE, DK, FI)
- **New skills, new job profiles and new staffing structures**: coordination, networking, case and care management, community care, counselling, companionship

Impact of the transformation of jobs on LTC work

New skills

- Rights-based approach; human interaction skills (person-centredness); intercultural communication; interprofessional cooperation; specific target groups; digital skills: e-health/e-care electronic beds, robotics, sensors

Education and job profiles

- From nursing-centred to LTC-centred education; tailored university modules; formal education to be revisited to meet LTC needs (rights-based, person-centred, community-oriented)

Further training

- Responsibility of employers; difficulties to foster workers' participation in further training

Digitalisation

- Opportunities to reduce administrative burden; use of digital tools is lacking promotion; AI: digital divide between generations

The EU Care Strategy

A focus on workforce issues

- New Sectoral Social Dialogue Committee on Social Services (kick-off December 2023)
- Support for capacity building for social dialogue at national level in the care sector

- LTC skills partnership, under the Pact for Skills (launched April 2023)
- Supported by Erasmus+ project Care4Skills (kick-off March 2024)

Studies:

- CEDEFOP: skills in LTC
- Application of EU labour law in LTC
- Domestic workers
- Policy brief LTC workforce
- Occupational safety and health issues in the health and LTC sector
- Undeclared care work in the EU (by Eurofound)
- Labour mobility and enforcement challenges in the LTC sector (by the European Labour Authority)

Funding:

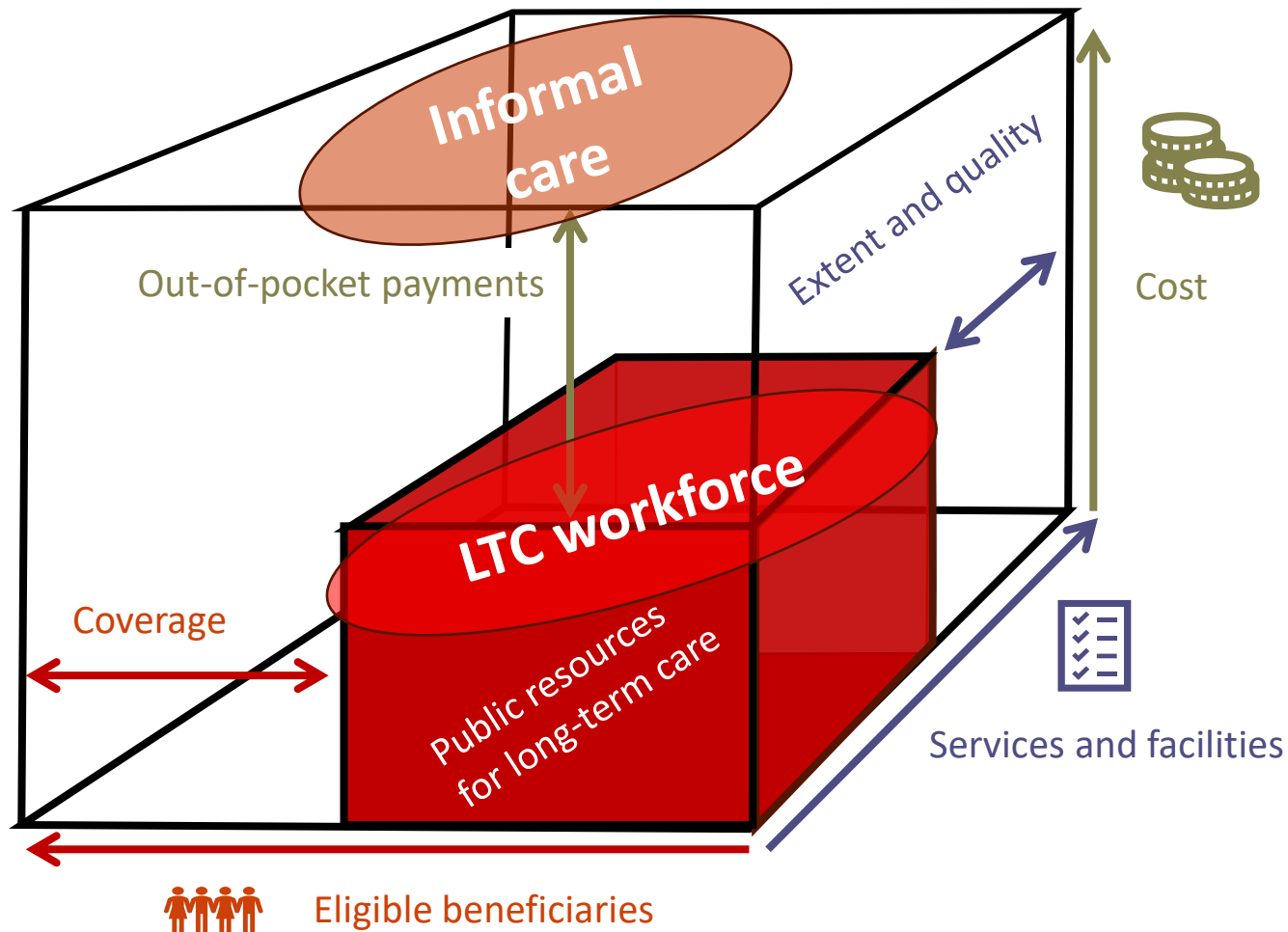
- Technical Assistance Instrument (TSI)
- European Social Fund+ (6.7 billion EUR)
- Recovery and Resilience Fund (8 billion EUR)
- Horizon Europe and Digital Europe



Conclusions

- Workforce shortages are now the major bottleneck for LTC expansion
- Investing in the LTC workforce through better training, skills and career pathways is critical to ensuring accessible and high-quality long-term care
- Improving working conditions is as important as recruiting more workers
- Technology complements workers, it does not replace them
- Sustainable LTC systems require integrated workforce policy not isolated recruitment initiatives

Conclusions



- Develop sustainable strategies to ensure rights, standards and funding
- Combat “care poverty” at all levels, including through support for informal carers
- Ensure sustainable LTC workforce by improving workforce planning, skills and working conditions
- Enhance prevention, including by coordination and integration at the interfaces of LTC with health, housing and technology



Thank you



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Berggasse 17, 1090 Vienna, Austria

+43 1 319 45 05-0

ec@euro.centre.org