

Healthy Competition: How the EU can prepare for the demographic transition

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In a world dominated by insecurity and anxieties around artificial intelligence, defence and security as well as the climate emergency, the demographic transition is another looming crisis for the EU. The European Commission's recent Competitiveness Compass rightly posits that the foundation of Europe's competitiveness is its people and Europe's labour market is undergoing a profound transformation.¹ Yet in the path for Europe the European Commission describes, the focus is mainly on "promoting skills and quality jobs", ultimately resulting in a Union of Skills to be presented later in the von der Leyen II mandate.

In its analysis, the Commission overlooks the demographic transition as an important horizontal transformation impacting (the health of) its workforce. This applies particularly to the healthcare sector. The costs of non-intervention are high: failure to address the demographic transition leads to workforce shortages and deterioration of healthcare delivery. This jeopardises the functioning of healthcare systems and ultimately our democracies; if citizens believe welfare systems are not delivering for them anymore, it impacts their trust in democracy and fuels the narratives of populist parties.

At a recent Policy Dialogue on Healthy Longevity organised by the European Policy Centre's Coalition for Health Ethics and Society and the Tony Blair Institute (TBI) for Global Change, the urgent need for strategic action on demographic changes in the EU was emphasised with healthy longevity identified as a key lever. Building on this discussion, this paper will explore actionable strategies to address these demographic shifts, emphasising the promotion of healthy longevity as a critical component of EU policy.

BACKGROUND: AN AGEING EUROPE

Ongoing demographic shifts² will result in almost 30% of the EU's population being over 65 by 2050 compared to around 20% today.³ Although life expectancy has increased, the quality of these additional years remains a significant concern, with over 40% of EU citizens aged 65 and over living with at least two chronic conditions.⁴ This is especially true for women, who tend to outlive men by several years but often spend those additional years facing health challenges, resulting in little to no difference in healthy life expectancy between genders.

Longer life expectancies increase demand for healthcare⁵ services and social care, often outpacing available resources.⁶ As the demographic transition happens, the pressure on healthcare services will intensify, necessitating strategic adjustments to ensure that health systems and the health workforce are adequately prepared to meet the growing and evolving demands. Specifically, health systems will face challenges such as a higher prevalence of chronic diseases,⁷ increased need for long-term care,⁸ and greater demand for geriatric specialists. Achieving healthy longevity demands a shift in culture in healthcare systems, transitioning from reactive care to proactive, comprehensive and preventive measures implemented throughout the course of life.

Healthy longevity

Ageing populations undoubtedly present challenges to the healthcare workforce, health systems and governments. Seeing ageing as an opportunity requires a shift in thinking towards the concept of healthy longevity, which emphasises living longer with maintained physical and mental well-being. Vital in this approach is the move from merely increasing life expectancy to enhancing the quality of life during later

years; not only focusing on extending life but also on ensuring that these extra years are lived in optimal physical, mental and social well-being.

The healthcare workforce plays a crucial role in the implementation of the concept of healthy longevity by providing preventive care, managing chronic conditions, and supporting mental health. Ensuring that the healthcare workforce is equipped to handle the complexities of an older population is vital for promoting healthy longevity and improving the overall quality of life for older adults. Therefore, to reap the benefits of healthy longevity, emphasis must be placed on preparing healthcare systems and societies more broadly. As such, prioritising the demographic transition and healthy longevity should be central to the EU's policy agenda, as reiterated by Mario Draghi in his recent report on the future of competitiveness.⁹

Brain health: Novel approach to well-being and longevity

In times of population ageing and a shrinking workforce, more emphasis should be put on prevention rather than on treating illness. This aligns with the concept of brain health, which posits that people's cognitive, emotional and social capabilities are crucial drivers of both productivity and well-being.¹⁰ With profound transformations taking place in the healthcare sector, the concept of brain health helps to address the connections between climate change, population aging, AI and other global issues reshaping our world.¹¹ Yet optimal brain health is a prerequisite to smooth these transformations from a brain-negative (brain-unhealthy) economy to a brain-positive (brain-healthy) economy¹² and focus on longevity rather than on health outcomes in a clinical setting. As the recent World Economic Forum in Davos showed, there seems to be growing support for the concept of brain health globally. In the EU, preparations for a Brain Health Partnership in the context of Horizon Europe are already underway.¹³

Healthcare workforce: A driver for healthy longevity

An ageing population requires resilient healthcare systems to promote healthy longevity and key to this is the healthcare workforce. However, the ongoing health workforce crisis¹⁴ is categorised as one of the biggest challenges to the sustainability of national healthcare systems. Health workforce shortages⁸ are a challenge in all member states (especially among nurses and primary care professionals) and are compounded by Europe's ageing population.

This challenge is driven by the "double demographic" effect, where an ageing population coincides with an ageing healthcare workforce.¹⁵ As demographics change, the pressure on healthcare services will intensify, necessitating strategic adjustments to ensure that health systems and the health workforce are adequately prepared to meet the growing and evolving demands. Specifically, health systems will face challenges such as a higher prevalence of chronic diseases,¹⁶ increased need for long-term care,¹⁷ and greater demand for geriatric specialists. At the same time, the healthcare workforce is ageing, with many doctors and nurses retiring or set

to retire in the coming years, creating a need for younger professionals to fill the gap.

A gendered issue

The gendered aspect of these challenges must not be overlooked. Women make up 75% of the health workforce in Europe.¹⁸ However, they remain underrepresented in decision-making roles within European health systems. The World Health Organization (WHO) has highlighted the lack of gender-responsive policies aimed at improving gender balance across health services, addressing recruitment shortages in underserved areas¹⁹, and reducing attrition rates among women, who often face poor working conditions. This issue is particularly pronounced in the care workforce, which is predominantly female. To ensure that the challenges of ageing populations are not disproportionately borne by women, it is essential to adopt a gendered approach to policies at both the EU and member state levels. Additionally, a gendered approach should be incorporated into efforts to promote healthy longevity, considering the actions needed to improve quality of life for men and women in later years.

STATE OF PLAY: EU ACTION

A toolbox for change

The European Commission recognises that demographic change is a cause for concern²⁰ and has developed various initiatives to tackle demographic changes, including the 'demographic toolbox'²¹. This toolbox was introduced to equip member states with strategies for addressing specific demographic challenges, emphasising the need for tailored policy responses rather than a universal approach.

The toolbox highlights that healthcare and long-term care systems in the EU must become more cost-effective while addressing old-age poverty, noting that affordable, high-quality care services can ease the burden on the EU's 53 million informal carers, of whom only 65% work full time. The toolbox further highlights that investing in care is crucial to attract and retain talent, improving wages, working conditions, and training for formal carers. With that said it is further acknowledged that workforce challenges persist due to aging staff, insufficient medical school graduates, and international competition for healthcare professionals, particularly in regions with declining populations. The role of digital technologies is emphasised as having the possibility to enhance cost-effectiveness, service quality, and social connectivity, provided that both users and professionals possess the necessary digital skills.

Digitalisation and AI: A silver bullet for the healthcare sector?

Digitalisation is often touted by policymakers as a major solution to the challenges faced by the healthcare sector, with policymakers sometimes seemingly over-optimistic when it comes to the deployment of AI in addressing workforce shortages in the healthcare sector.²² Certainly, adopting digital technologies brings many advantages such as streamlining cumbersome tasks. Yet it also brings data abundance, which requires skills from

healthcare workers to effectively utilise and benefit from these new technologies.

Addressing this skills gap is crucial to enable the healthcare workforce to fully leverage digital advancements, leading to improved patient outcomes and more efficient healthcare systems. By fostering the necessary digital competencies among healthcare professionals and providing them with proper training, we can ensure that they are well prepared to navigate the evolving landscape of healthcare technology. This will be particularly important in the context of the implementation of the European Health Data Space across member states.

Addressing long-term care: The European Care Strategy

Solutions, digital and otherwise, must consider the whole healthcare ecosystem. Particular attention must be given to long-term care, which will be imperative in an ageing society. While the European Care strategy seeks to improve caregivers' working conditions, the absence of specific targets for long-term care misses an opportunity to address the difficulties encountered by those in the care sector, particularly considering ageing populations. The Polish Presidency's intention to review the strategy is welcome and poses an opportunity to introduce targets like the Barcelona targets for childcare into the long-term care strategy. A revision of the care strategy also offers the opportunity to adopt a healthy longevity approach to long-term care.

Investment in skills: A key lever

Investing in health systems and preparing the healthcare workforce for the demographic transition should be a priority for EU member states. To address the disparity between countries, the EU has instruments to deploy such as the Technical Support Instrument (TSI). The TSI plays a vital role in assisting member states in designing and implementing structural reforms aimed at promoting up- and re-skilling initiatives. For example, the TSI has supported Italy²³ in developing a comprehensive approach to improve digital skills among healthcare professionals. This includes operational guidelines to facilitate the adoption and use of the Electronic Health Record (EHR) 2.0, aiming to enhance the quality and resilience of the health system. Equally, the TSI has helped Lithuania²⁴ to improve the distribution of healthcare professionals and develop a competence assessment framework for healthcare workers.

A global problem

The EU is not unique in the challenges it faces with an ageing population. There is a lot that can be learnt from other parts of the world including Singapore and Senegal, as was demonstrated at the recent EPC/TBI event on healthy longevity. African approaches to preventative healthcare show how early investment builds system resilience. In Senegal, 25,000 community health workers enhance preventative care and infrastructure; Rwanda's 45,000 workers form the core of its health system; and Ethiopia's programme deploys 40,000 workers to provide essential services at the community level.²⁵ Sharing these experiences and exchanging knowledge with other parts of the world can not only lead to solutions but also offers

potential to build mutual trust between partners in the Global North and Global South.

PROSPECTS: POLICY RECOMMENDATIONS

Place healthy longevity at the forefront of EU policymaking

The EU's ability to navigate the challenges of an ageing population are contingent on a long-term integrated approach to policymaking to prepare for the demographic transition. Specifically, addressing healthcare workforce challenges will necessitate coordinated efforts among policymakers in a variety of sectors such as the healthcare sector, social care, labour, education, migration and the financial sector. Forecasting and strategic planning will be crucial to prepare health systems and establish a sustainable health workforce for future generations, bolstering overarching EU priorities such as competitiveness and productivity.

Mobilise the concept of brain health as a pathway to well-being and longevity

With profound transformations taking place in the healthcare sector, the concept of brain health helps to address the connections between climate change, population aging, AI and other global issues reshaping our world.²⁶ As the recent World Economic Forum in Davos showed, there seems to be growing support for the concept of brain health globally. In the EU, preparations for a Brain Health Partnership in the context of Horizon Europe are already underway.

Unlock the potential of digitalisation and AI for the health workforce

To fully harness the potential of digitalisation and artificial intelligence, addressing the skills gap in the healthcare workforce is paramount. Training healthcare professionals in digital competencies will enhance their ability to use advanced technologies, thus improving patient outcomes and healthcare efficiency. This training is particularly critical for the successful implementation of the European Health Data Space across member states.

Invest in skills and training for a resilient workforce

EU member states must prioritise retention strategies and improve the appeal of healthcare professions by enhancing working conditions for healthcare workers. Addressing work-related stress and fostering a positive work environment is essential to prevent worsening workforce shortages. This should include all healthcare workers, particularly those engaged in care roles. A review of the EU Recommendation on access to affordable high-quality long-term care should adopt targets to ensure all member states strive to achieve access to long-term care. Member states should leverage instruments such as the Technical Support Instrument to ensure a resilient healthcare workforce capable of responding to the challenge of Europe's ageing population.

Foster global collaboration on healthy longevity

As much as multilateralism in global health is under threat in today's evolving global order, the EU should strengthen its cooperative efforts with international partners to share best practices given the global impact

of demographic transitions. Learning from successful models, such as those implemented in Singapore, will enhance the EU's responses to an ageing population. A broader global health agenda should emphasise promoting functional potential, achieving equity and advocating for healthy longevity, rather than focusing solely on disease prevention.

Ensure gender-sensitive approaches

To prevent the challenges of ageing populations from disproportionately affecting women, it is crucial to adopt gender-sensitive approaches to policies at both the EU and member state levels. Furthermore, promoting healthy longevity should integrate a gendered perspective to ensure that actions improve the quality of life for both men and women in their later years. The healthcare workforce is the cornerstone of health systems and will play a pivotal role in promoting healthy longevity.

Women dominate Europe's healthcare workforce and carry out the majority of unpaid care work. Therefore, it is essential that the gender implications of policy response are considered to reduce inequalities and avoid any exacerbation of current inequalities.

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