

Ageing and The Long-Term Care Economy in the MENA Region

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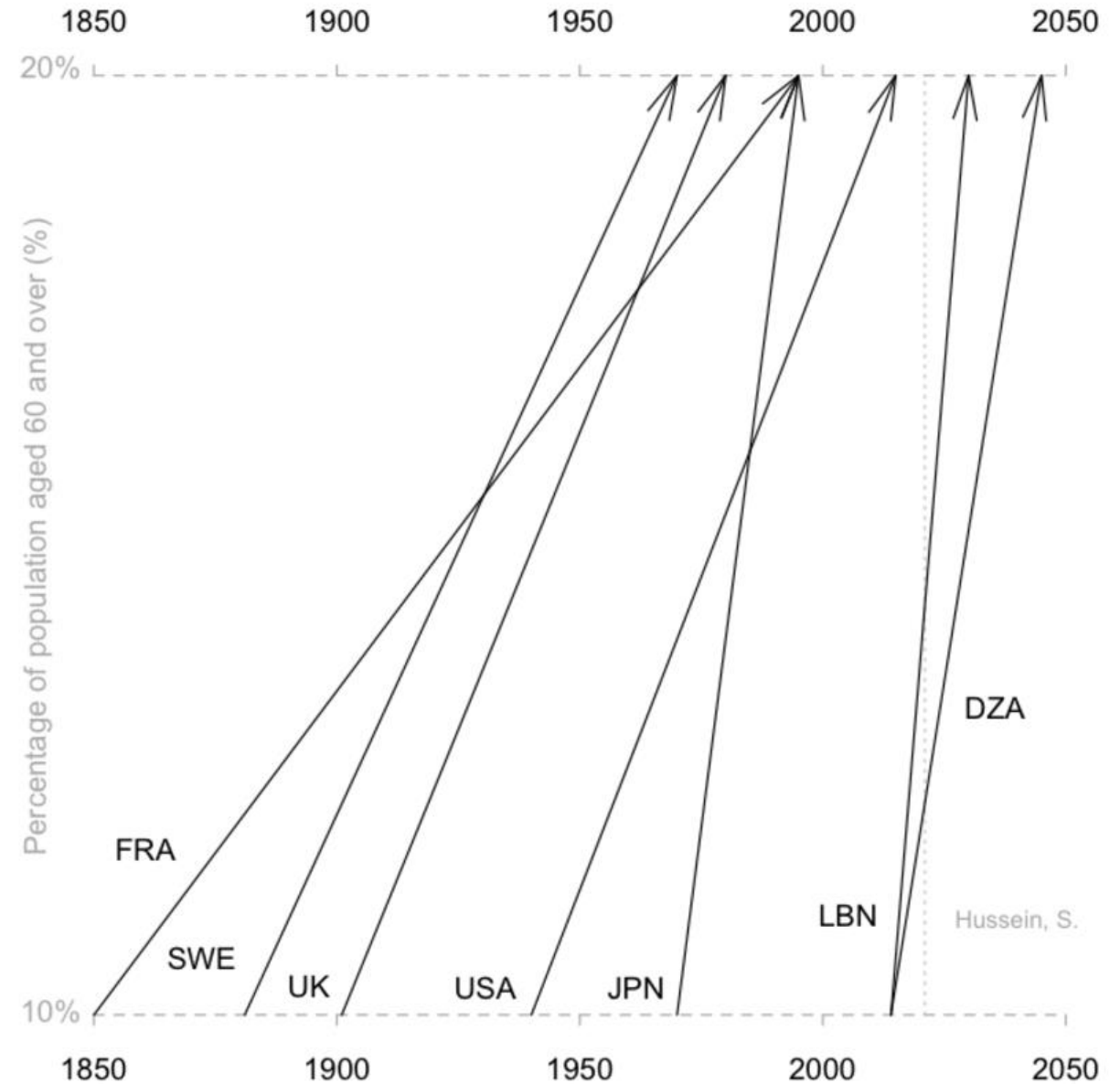
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Fast Ageing Transition



(un)Healthy Life Expectancy and Morbidity

	LE- M	LE-F	HLE-M	HLE-F
France	79.8	85.1	71.1	73.1
Germany	78.7	84.8	69.7	72.1
Italy	80.9	84.9	71.2	72.6
Netherlands	80.4	83.2	71.4	71.5
Norway	81.1	84.1	71.1	71.6
UK	79.8	83.0	69.6	70.6
Algeria	76.2	77.5	66.7	66.1
Egypt	69.6	74.1	62.3	63.7
Saudi Arabia	73.1	76.2	63.8	64.4
Lebanon	74.0	79.2	65.1	67.1
Morocco	71.7	74.3	63.7	63.7
Syria	71.2	74.3	62.5	63.3

LTC services and markets

Reliance on the family
The 'invisible' welfare
scheme

(un)sustainability of family
care

- Socio-economic and demographic changes
- Emotional burden
- Competing opportunities

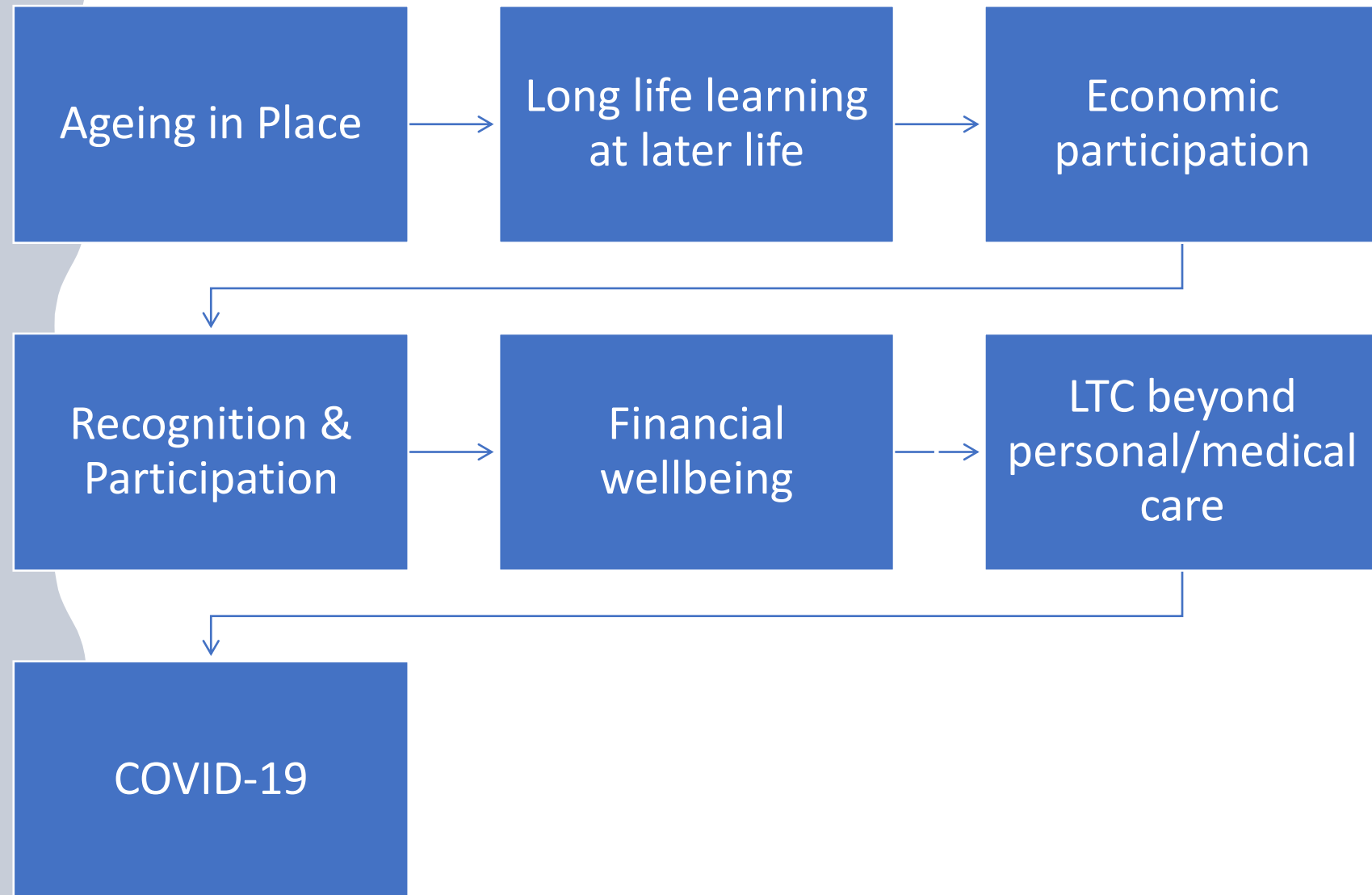
Suitability/adequacy of
care

LTC jobs one of the fastest
growing markets across the
globe

Attracting women in
particular
Labour gender-gaps

Employment opportunities
within a context of high
female unemployment
rates

Quality of life at later ages



LTC services



Fully independent older people

- Community participation
- Later life learning
- Day centres
- Home support services
- Preventative services
- Digital literacy



Older people with care needs

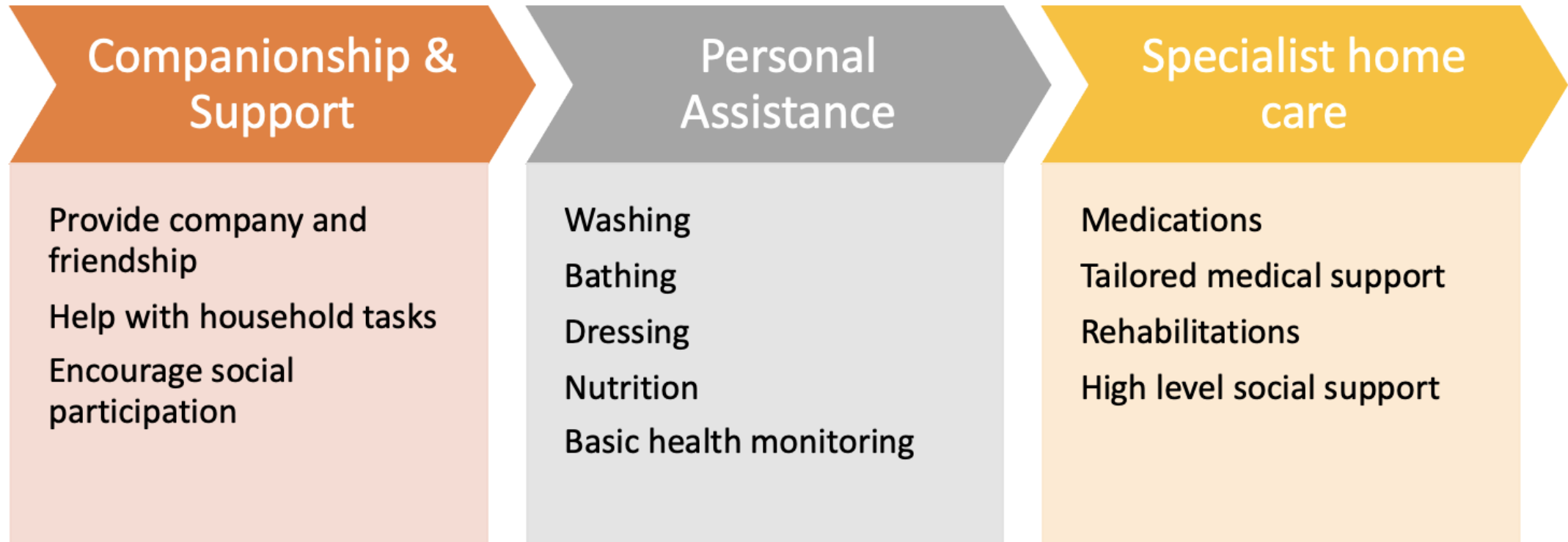
- Home care
- Day care
- Home support services
- Supported living
- Family support services
- Community support



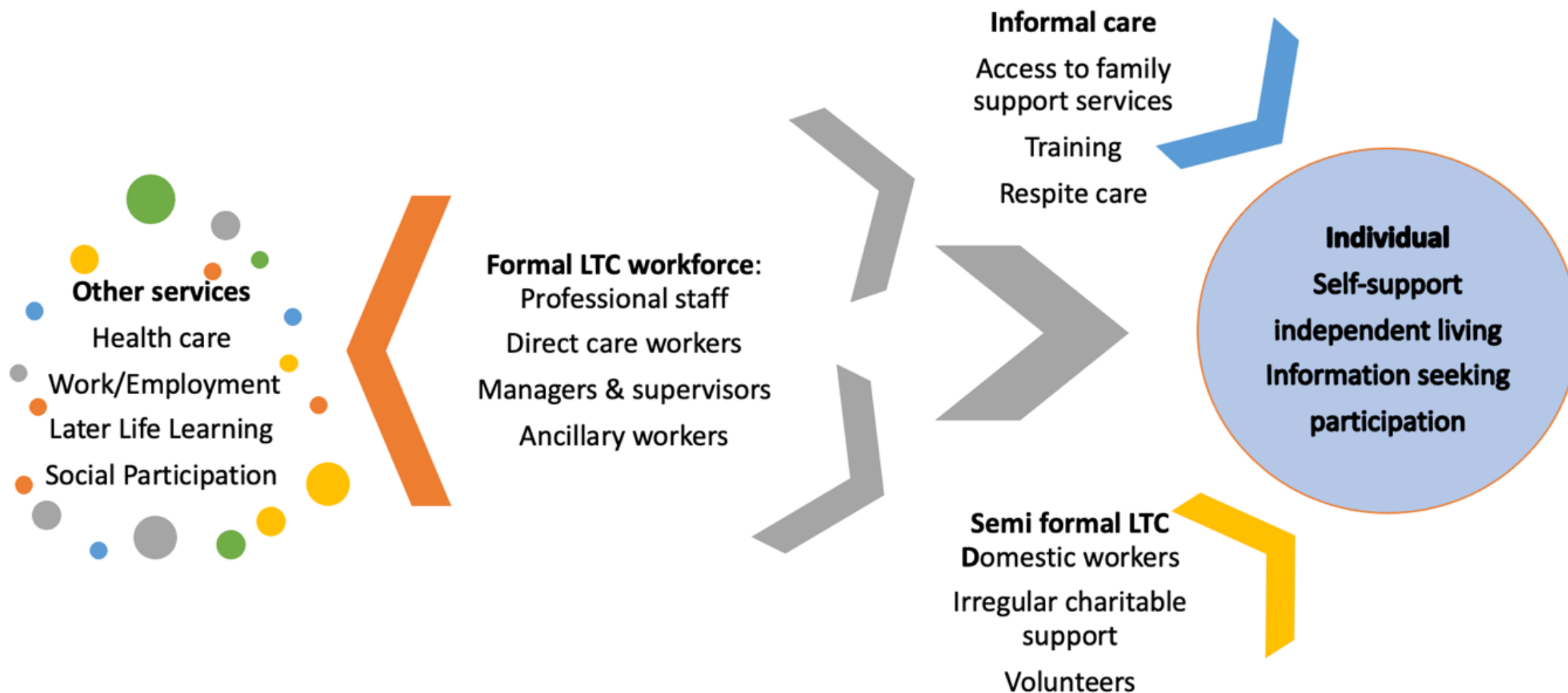
Older people with complex needs

- Care homes
- Nursing homes
- Palliative care
- Family support services
- Specialist care services (e.g. Dementia care)

Home Care



The interactive role of the LTC workforce



LTC support
&
mechanisms
in three case
studies

Characteristics	Syria	Kingdom of Saudi Arabia	Egypt
Average Life Expectancy at Birth (2019):			
Total	73 years	75 years	72 years
Males	68 years	74 years	70 years
Females	78 years	77 years	74 years
Percentage of the population 65+ (N) in 2020	4.9% (853,056)	3.5% (1,217,949)	5.3% (5,456,144)
Old Age dependency Ratio in 2020	8.8	5.3	10.2
Total Fertility Rate (2019)	2.8	2.3	3.3
Female Employment Rate in 2019	16.7%	15.8%	20.6%
Net Migration (2017)	-2,136,954	674,895	-190,164
GDP per capita (USD) (2019)	1,194 \$	23,337 \$	3,153 \$
Health Care Expenditure as % of GDP (year)	3.57% (2012)	6.36% (2018)	4.95% (2018)
Year ageing transition start (years to complete)	2035 (17 years)	2033 (12 years)	2036 (42 years)
Context	Low income; Political Conflict; Levant Region	High income; high levels of in-migration; Gulf region	Low-Middle Income; most populous; North Africa

Case Study 1: The Evolving Long Term Care Market in Syria

- War/conflicts affected all age groups including older people
- The Syrian Commission for Family and Population Affairs study (2019)
 - Assessing the needs of older people between 2011 to 2019
 - Primary data collection comprising 94 in-depth focus group discussions (10 in each governorate) and four workshops with 950 participants
 - The needs for effective social protection mechanisms
 - Developing formal long term care services to complement family aged care

Current LTC services in Syria

Perception of Ageing: intersectionality of gender, employment & socio-economic status

Health status: co-morbidity, access to health services & regional variations

Social participation: paid employment, recreational activities

LTC services: the role of family, NGOs & charitable organisations. Broader services meals, clothing, financial support + residential and home care. Decline since the war; geographical disparities. Lack of specialist services (e.g. dementia care)

Case Study 2: The evolving LTC markets in the Kingdom of Saudi Arabia

LTC market is estimated to be one of the major growth sectors in KSA (esp. rehabilitation, extended care facilities, psychiatric centres and home health care)

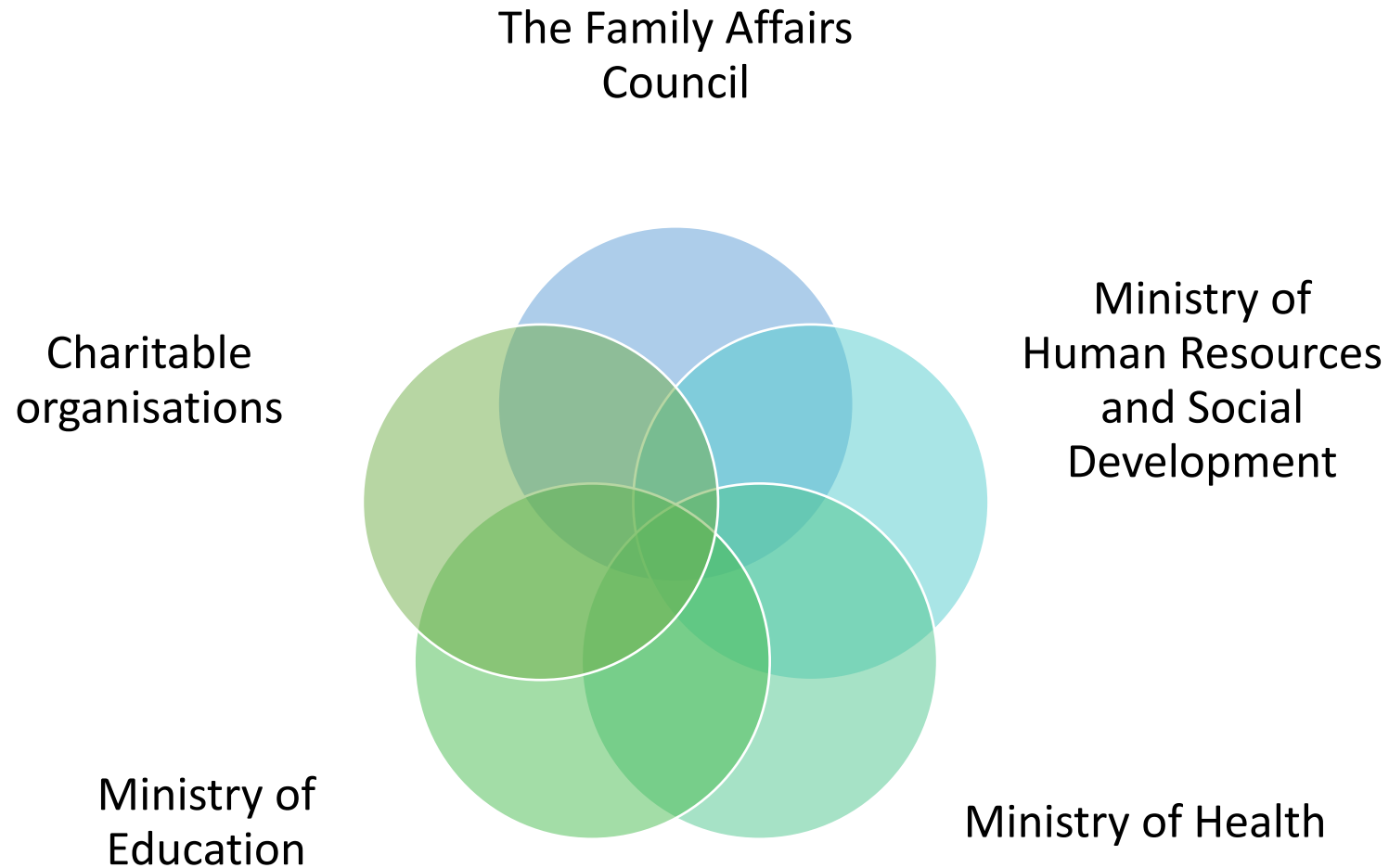
Health care transformation as a part of the 'Saudi Vision 2030'. Home care is a core element

Funded by the government with some services purchased from the private sector

KSA National Strategy for the Family



Cross-ministerial efforts to support older people



Case Study 3: LTC in Egypt

- The role of families & charitable organisations
- The Universal Health Insurance (UHI) launched in 2018
- Social protection: two schemes 'Takaful' (solidarity) and 'Karama' (dignity) since 2015
- The Older People's Rights' Law currently, 2021, being debated
- New initiatives currently in progress: The Golden Card; 'Al-Tadamun' older person's companionship programme
 - Piloted in 2019 with 51 successfully trained individuals
 - A new scheme is currently being prepared

Demand for a formal LTC market: A recent phone survey study (Baseera)

Statement	Level of agreement				
	Totally agree	Agree	Neutral	Disagree	Totally disagree
If someone is not able to take care of their parents, they may admit them to a nursing care home	6.2%	21.3%	3.0%	12.6%	56.8%
If someone is not able to take care of their parents, they may hire a formal LTC provider	18.9%	48.5%	2.2%	10.7%	19.7%
The formal home care worker could be left alone with the older person	10.1%	34.1%	5.0%	30.7%	30.1%
Having formal LTC services for older people is essential	20.0%	31.4%	4.1%	24.9%	19.6%
Most of those who work as formal LTC workers do not have specialized training	15.8%	27.2%	37.4%	14.2%	5.4%
Formal LTC services must be specialized	66.1%	19.3%	3.2%	10.4%	1.0%

LTC Cost components

- Home Care

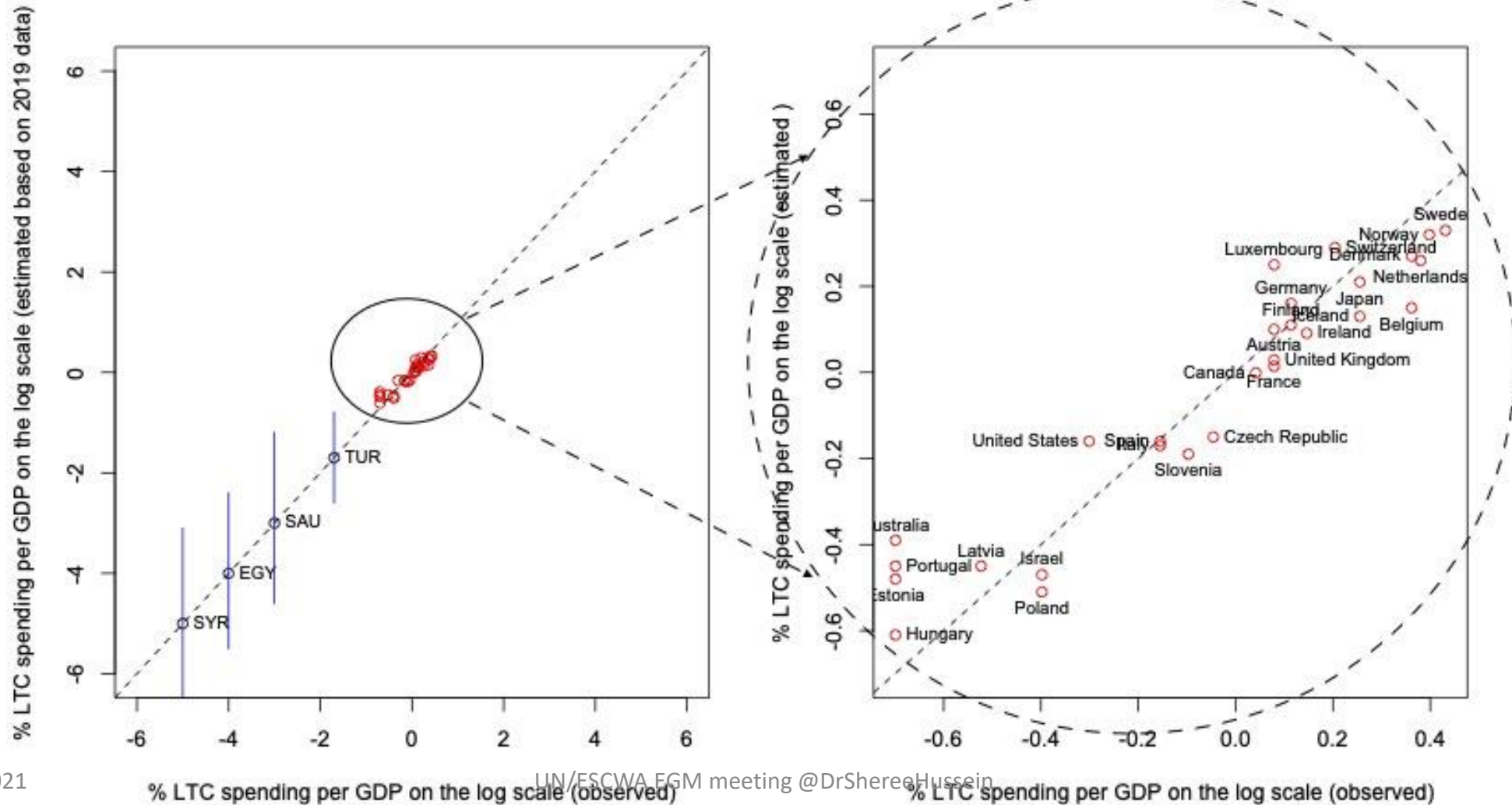
- Workforce cost- including wages, supervision, training & assessments
- Care co-ordination (e.g. agency)

- Care Homes

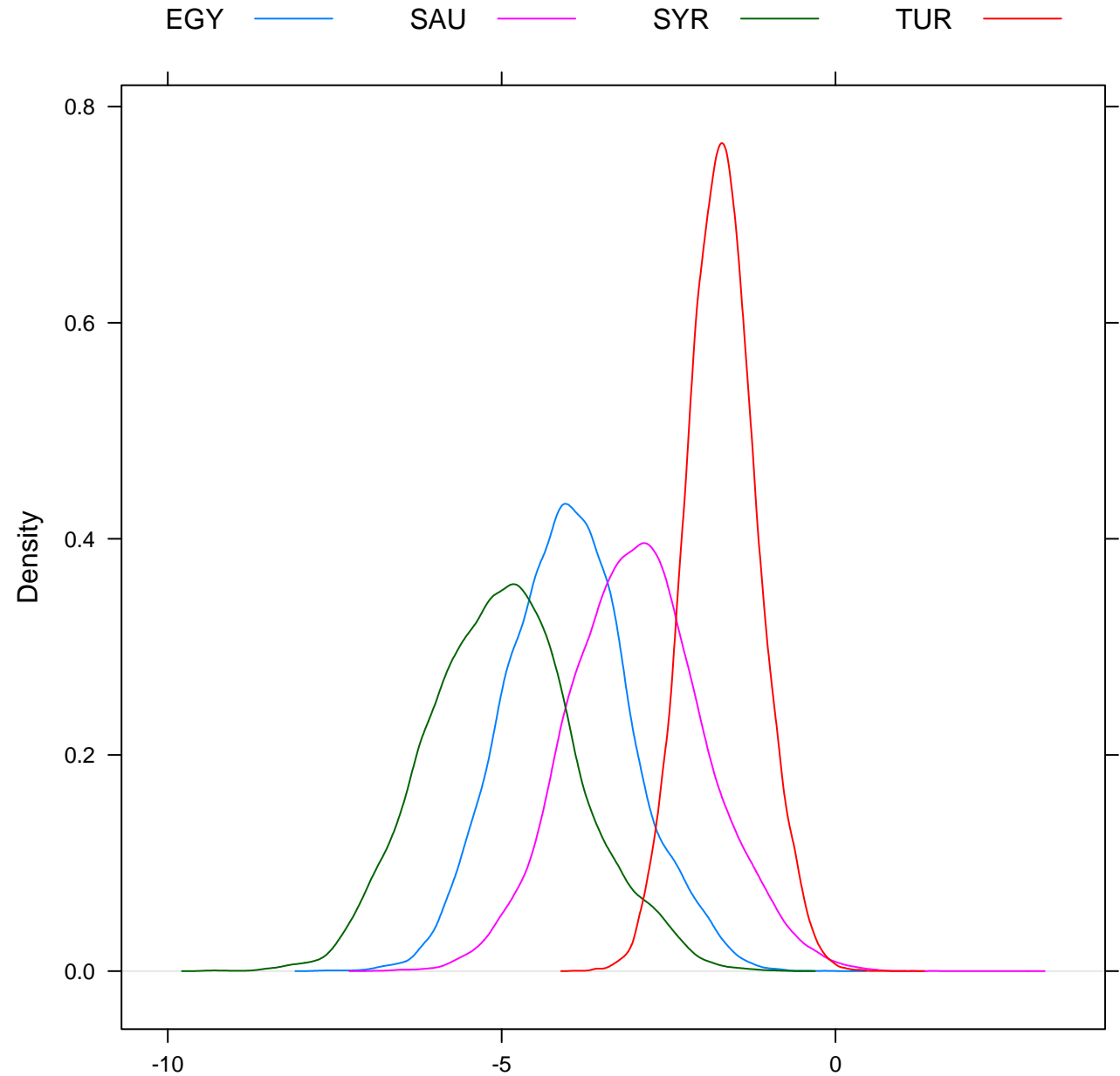
- Staffing cost
- Non-staffing cost (e.g. utilities, maintenance etc.)
- Capital cost (buildings and infrastructure)

Other Care services e.g. community and day care

Modelling LTC cost



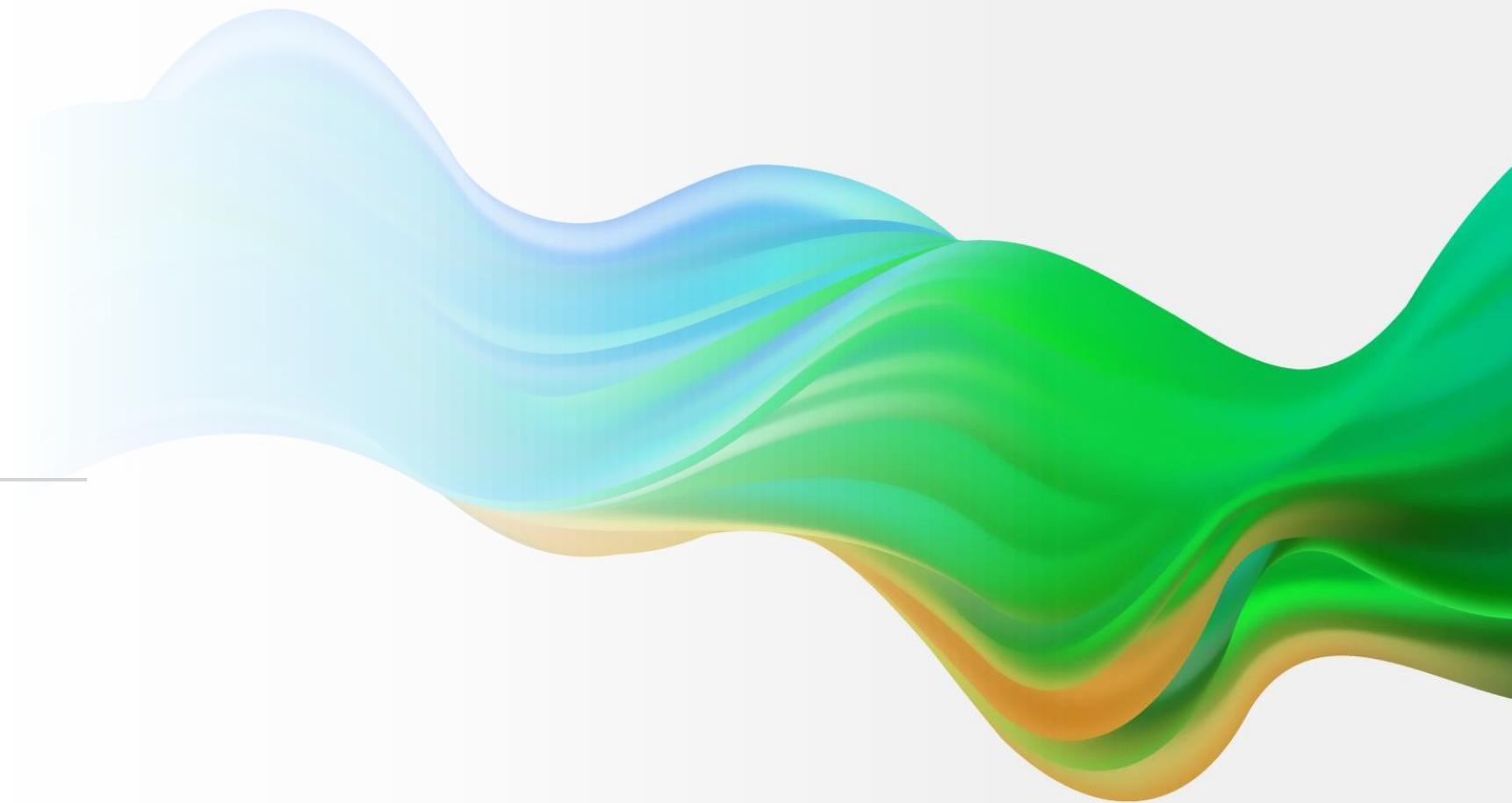
Estimated LTC as % of GDP



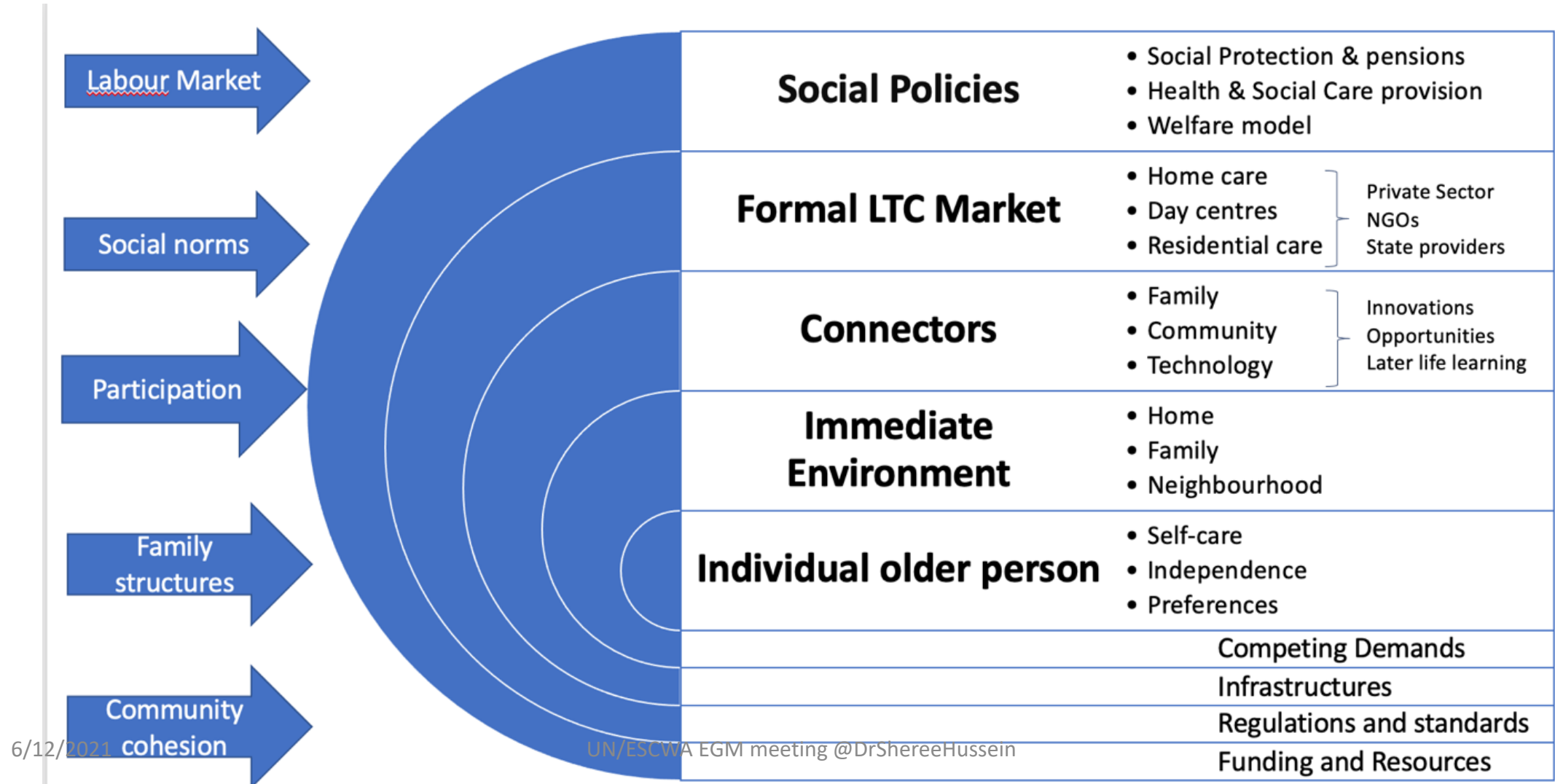
% LTC spending per GDP on the log scale (estimated based on 2019 data)



Conclusion



The LTC ecosystem



Social isolation
Care interruption

Technology
Access inequalities

COVID19 & LTC
market

Changes in LTC preferences
Severity of needs

Workforce implications
Financial cost



Thank you for listening

Any Questions

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