



**MINISTRY OF FOREIGN AFFAIRS
OF DENMARK**

DANISH.CARE
Trade Association for Assistive Technology

WEBINAR: EXPORT OPPORTUNITIES IN THE CEE-REGION

POLAND, CZECH REPUBLIC, UKRAINE, HUNGARY & SLOVAKIA

APRIL 21ST 2021

TIMELINE OF TODAY'S WEBINAR

- 12:30 – 12:40 Welcome and short background
- 12:40 – 13:05 Ukraine, with Tetyana
- 13:05 – 13:30 Czech Republic, with Lenka
- 13:30 – 13:55 Hungary, with Balazs
- 13:55 – 14:00 BREAK
- 14:00 – 14:25 Poland, with Marcin
- 14:25 – 14:50 Slovakia, with Lenka
- 14:50 – 15:10 Information about the export promotion



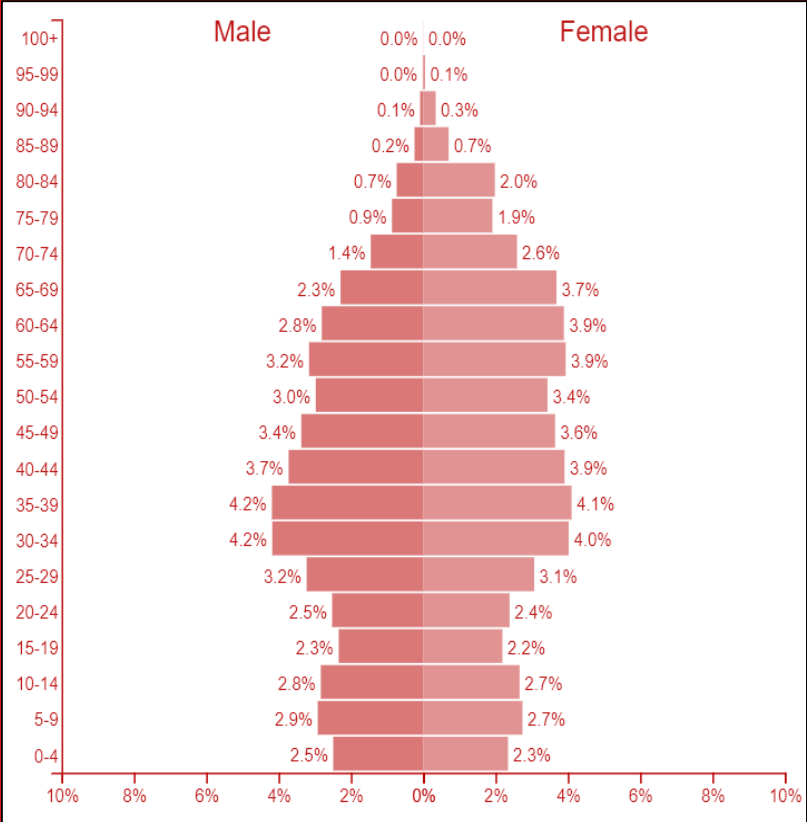
**MINISTRY OF FOREIGN AFFAIRS
OF DENMARK**

UKRAINE

**MARKET OPPORTUNITIES BY TETYANA KOBCHENKO
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By The Danish Trade Council - Build on a regional collaboration

MARKET OVERVIEW AND STRUCTURE



DEMOGRAPHIC INDICATORS

POPULATION

- Population per January 2020: 43.7 millions
- Forecast for 2050 Population: 35.2 millions

CITIZENS OLDER THAN 65

- Per January 2020: 7.15 millions
- Forecast in 2050: 9.02 millions

AGE FOR GOING TO PENSION

- 60 for women
- 65 for men

STATE PENSION

- DKK 385 minimum
- DKK 790 on average

LIFE EXPECTANCY

Year	Total		Healthy Years		At +65	
	Males	Females	Males	Females	Male	Females
2013	65,7	75,7	59,0	67,0	12,5	16,4
2050	69,8	78,8			13,4	18,1

DETAILS ABOUT THE MARKET

The state plays chief role in the planning, financing and development of health care services to the seniors through two state stakeholders:

- **Ministry of Public Health**
- **Ministry of Social Policy of Ukraine**

State geriatric hospitals State and Private hospitals	Eldercare housing facilities	Care housing facilities for the veterans of war and labor
State or private owned organizations where seniors who have lost support as well as other maintaining possibilities or are in need of 24h care get the housing and other social and medical care and support.		

DETAILS ABOUT THE MARKET

200 OUT OF 540 State-owned eldercare housing facilities included in the state registry

42 private-owned eldercare facilities included in the state registry ?

25.000 seniors live in state or private owned eldercare facility

100.000 people are taken care at the stationary healthcare facilities *(including specialised hospitals)*

1.000.000 people are taken care by social workers at home (data for end of 2020)

THE PRIVATE HOMES FOR ELDER PEOPLE ARE REGISTERED AS LLC, THEREFORE, IT IS VERY HARD TO ESTIMATE THE EXACT NUMBER OF PRIVATE OPERATORS IN THIS SPHERE

CONSTITUTION OF UKRAINE, ARTICLE 51: ADULT CHILDREN SHALL BE OBLIGED TO CARE FOR THEIR PARENTS WHO ARE INCAPABLE TO WORK
[HTTP://WWW.PRESIDENT.GOV.UA/DOCUMENTS/CONSTITUTION](http://www.president.gov.ua/documents/constitution)



Source of funding the eldercare housing facilities

Municipal and state budgets and seniors pension

- **42,8** million USD was provided in 2017 on the maintenance of residential homes for the elderly people
- **250-350** USD monthly is allocated by the state for one senior patient

Distribution of the allocated sum to eldercare sector

- **50%** of this amount goes to the salary fund for employees
- **30%** on food
- **3%** on medicines

75% of the senior's pension goes to cover living costs in case there are no relatives nor funds to support a senior person who needs the eldercare housing

**FAMILY CODE OF UKRAINE, ARTICLE 202: AN ADULT DAUGHTER, SON
SHALL HAVE THE DUTY TO MAINTAIN THEIR PARENTS THAT ARE
UNABLE TO WORK AND IN NEED OF MATERIAL SUPPORT.**

LIVING COSTS ARE COMPENSATED BY THE RELATIVES OF A SENIOR PERSON

MARKET OPPORTUNITIES IN UKRAINE

Chain Rena Med

- Big chain with 12 nursing home, operating in the biggest cities in Ukraine
- Cooperating with the private clinics and laboratories
- Finishing a new rehabilitation center with the professional equipment, there are plans for more

Potential interest in Danish solutions:

- Specific technologies for the construction of the nursing homes
- Equipment
- Training and education programs for the staff



Better conditions and medical care

Costs for living starts from 500 USD



MARKET OPPORTUNITIES IN UKRAINE

Chain Turbota (Care)

- It operates with 8 nursing homes in 5 cities of Ukraine having about 240 senior patients
- The company is building new homes in other big cities of Ukraine
- The chain considers launching a broader scope of services within rehabilitation

Potential interest in DK solutions:

- IT solutions for management of the personnel and chain procurements
- Training for the medical staff
- Training equipment for rehabilitation.



MARKET OPPORTUNITIES IN UKRAINE

Let's Help

The largest NGO in Ukraine that conducts charity activities and fundraising for the state geriatric institutions.

Currently the Fund works with **143 state geriatric homes** all over

Potential interest in DK solutions:

- Education of the personnel
- Basic LTC products
- Training equipment



MARKET OPPORTUNITIES IN UKRAINE

Ukraine Public Buildings Energy Efficiency Project by EIB and E5P

- EUR 300 million of a loan
- EUR 4 million of a grant

Aim of project
Increase energy efficiency in 1,000 buildings - mainly kindergartens, hospitals and schools

Save more than 1 million tonnes of CO2 and will benefit to over 2.5 million people.

By including COVID-19 measures, the project will also improve the medium and long-term pandemic resilience of hospitals.



GOOD TO KNOW

- **Language barriers** when participating in public tenders
- majority (if not all) elder care state centres **do not receive** budget for development
- Main opportunities within the **private sector** although public sector should not be excluded
- Market opportunities are high because **competition is low** as local players are not up-to-date



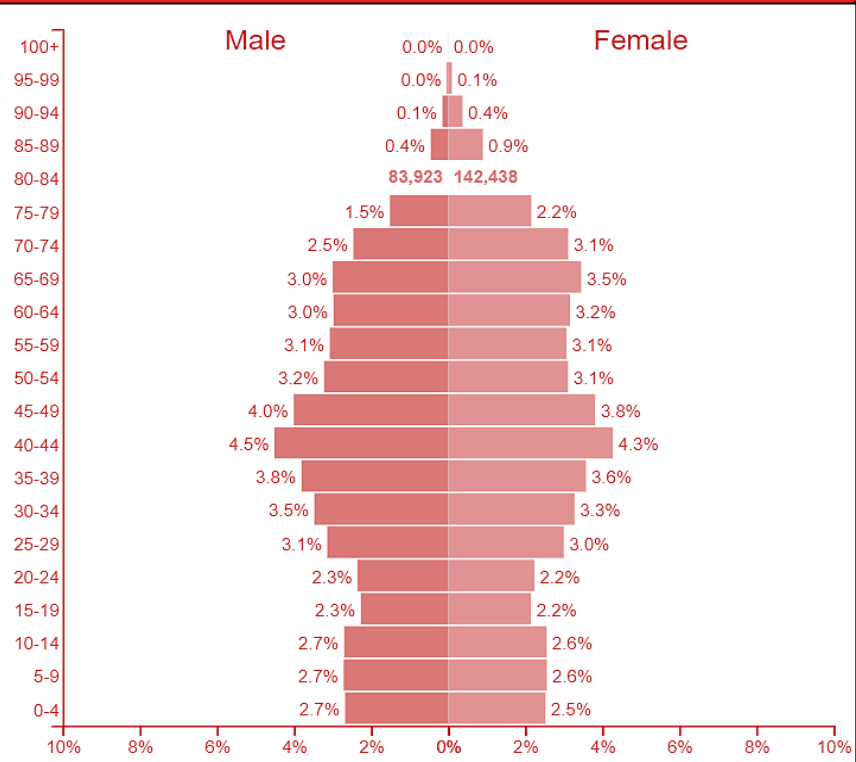
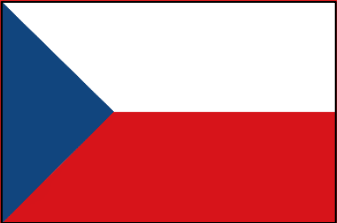
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CZECH REPUBLIC

**MARKET OPPORTUNITIES BY LENKA ANDRÝSOVÁ
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MARKET OVERVIEW AND STRUCTURE



DEMOGRAPHIC INDICATORS

POPULATION

- 2021: 10.70 million
- 2050 forecast: 10.05 million

CITIZENS OLDER THAN 65

- 2021: 2.1 million
- 2050 forecast: 3.1 million

AGE OF PENSION

- 63 for men
- 62 for women

STATE PENSION

- On average, 4000 Dkk

FUNDS ON ELDERCARE

- Strategy on Preparation on the Aging of Society 2019-2025: 870 million DKK
- EU Recovery Fund: 2 billion DKK

LIFE EXPECTANCY

- Women: 82 years from birth
- Men: 76 years from birth

DETAILS ABOUT THE MARKET

Number of beds	2013	2018	Difference
Public	41.649	41.520	-129
Non-public religious	3.073	3.053	-20
Private	5.417	12.550	+7.133

Care allowance based on the level of dependence	1	2	3	4
Person receives the allowance directly	880 CZK	4.400 CZK	12.800 CZK	19.200 CZK
Person is assisted by a provider of residential social services			8.800 CZK	13.200 CZK

Opportunities in private sector

- **Private sector growing faster than public sector**
- **Private sector is** the biggest player in elderly homes with special treatment (esp. for Alzheimer's patients).

MARKET OPPORTUNITIES IN CZECH REPUBLIC

Challenges that needs to be addressed:

- **Lack of labor** to take care of elders
- **Alzheimer** is a growing issue
- **Technology** to monitor elders in home

Czech stakeholders to collaborate with

- **Alzheimercentrum pp s.r.o.** (CZ, SK, 1.900 beds in 2019)
- **ALZHEIMER HOME GROUP s.r.o.** (home care and elderly homes, 8 Alzheimer homes with more than 500 beds, plans 1.200 to 1.500 beds)
- **Clementas, a.s.** (280 beds, building 3 nursing homes)
- **SeneCura s.r.o.** (largest non-governmental elderly facilities provider, 15 elderly homes with 2.044 beds, plans in the Southeast Europe)
- **Sanatorium Topas, s.r.o.** (850 beds in 6 facilities mainly for Alzheimer patients)
- **Domov Alzheimer Group**
- **Children's Hospice – Charity of Vlček's family (1,5 bil CZK)**



FORMER CASES WITH ELDERCARE IN CZECH REPUBLIC

otiom[®]

<https://otiom.com/>



GPS tracker for alzheimer elders

List of private companies who has been involved in czech eldercare

- **Otiom A/S** (searching for a distributor in the Czech Republic)
- Abena A/S (exclusive distributor in CZ and SK)
- Arjo Czech Republic s.r.o. (covering SK)
- V. Guldmann A/S: NOLLE CZECH, spol. s r.o.
- Wellness Nordic A/S (selling in CZ through Arjo)
- Turn Aid: LB Bohemia
- Sunrise Medical: Medicco Czech Republic
- R82 A/S, Etac A/S, Sorg: REHA 2015, s.r.o
- Permobil Danmark A/S: Ortoservis

GOOD TO KNOW

- **Czech Association of Social Care Providers:** a great outreach both to eldercare operators and government
- Bring **innovations** which help them work better, efficiently and which saves their resources.
- Focus on what investment in your product can bring the managements of elder homes (not only financial, but **impact on labour or happiness of their customers**, too).
- Use opportunity to **present your products** at trade shows or conferences.



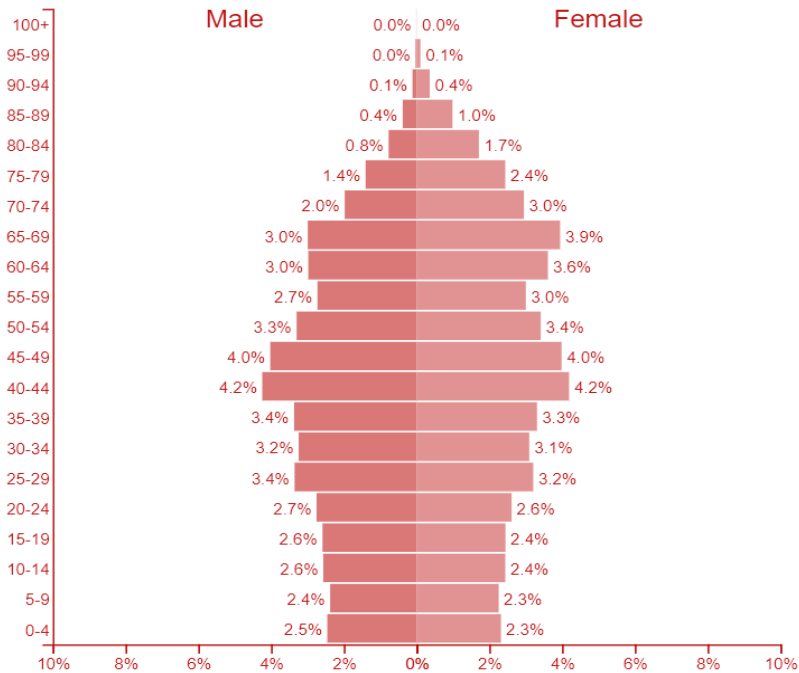
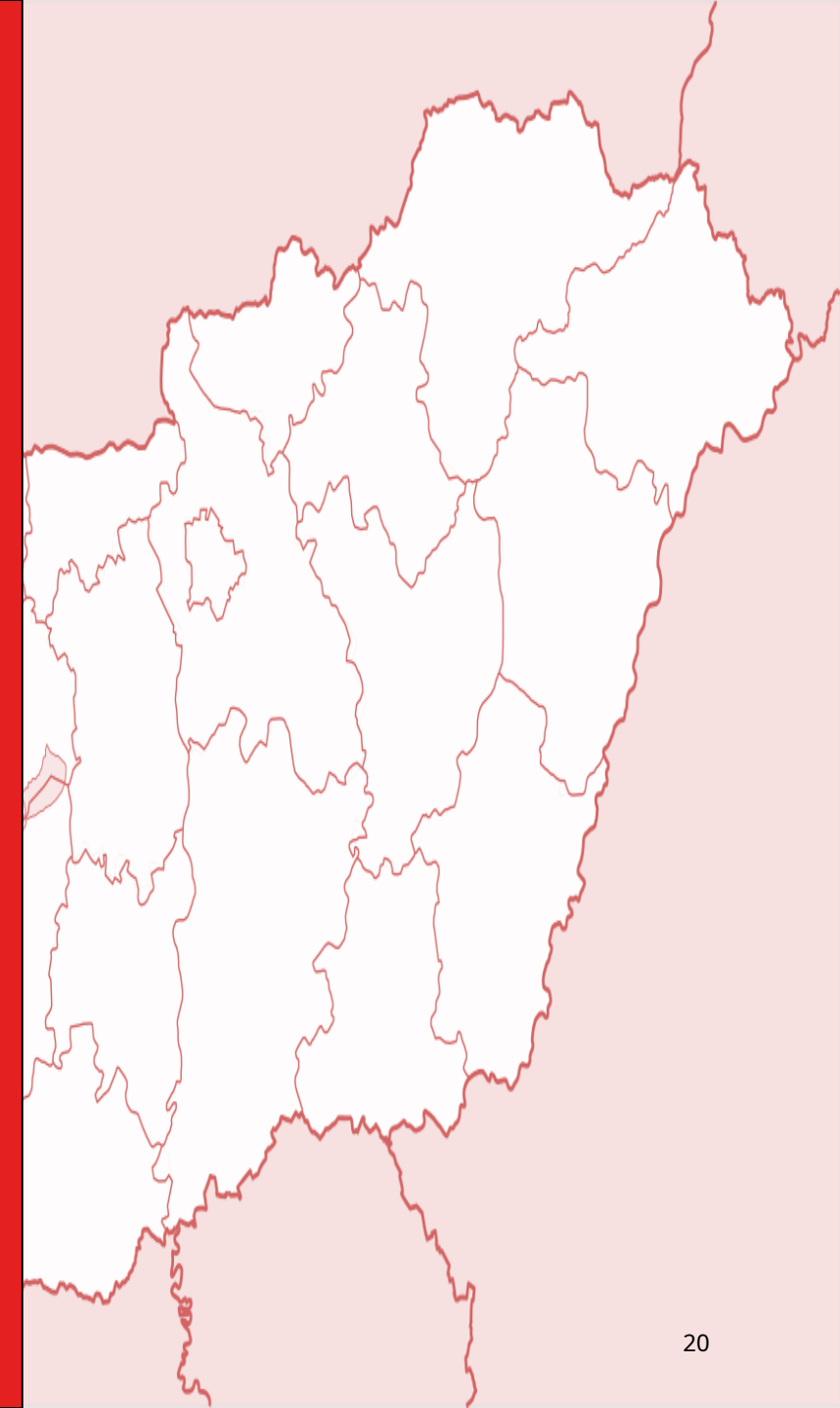
**MINISTRY OF FOREIGN AFFAIRS
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HUNGARY

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MARKET OVERVIEW AND STRUCTURE



DEMOGRAPHIC INDICATORS

POPULATION

- 2021: 9.77 million
- 2050 forecast: 8.5 million

CITIZENS OLDER THAN 65

- 2021: 1.9 million
- 2050 forecast: 2.4 million

AGE OF PENSION

- On average, above 65

STATE PENSION

- On average, 2600 Dkk in 2019

LIFE EXPECTANCY

- Women: 79 years from birth
- Men: 72 years from birth

Life expectancy of elders are growing

DETAILS ABOUT THE MARKET

Types of Eldercare			
Provided by Church, government, civil society or Municipalities			
Long term care	Care at home	Care using alarm system	Day care

- Generally, capacity and number of residents are growing
- **Private sector** is **growing** and is better equipped
 - **State** and **municipal** remain biggest players but are **shrinking**. Poor conditions
 - **Church** are traditional players and state delegated a **bigger role** to them

- Financing**
- General support from the central budget (limited) depending on services provided, and own co-financing required by the operators
 - Care fee is max 80% of pension, plus entry fee' charged

MARKET OPPORTUNITIES IN HUNGARY

Challenges that needs to be adressed

- **Low digitalization** level of functions and services
- **Dementia/Parkinson** is a growing challenge in an ageing population
- To provide a clean, safe and comfortable **care environment**
- **Old infrastructure**, buildings, systems

Mainly stakeholders identified in **private sector** and **churches** have been mentioning following solutions to solve challenges

Possible solutions

- Smart, digital solutions
- Convenience items
- Sensors for safety – mobile and stationary items
- Dementia-care and related
- Disinfecting



DANISH COMPANIES ALREADY PRESENT IN HUNGARY



<https://www.guldmann.com/int/>

Guldmann A/S is already present in following places:

- Rehab
- Hospitals
- Nursery Homes

GOOD TO KNOW

- **Double pay system** in the services (private and state support)
- Cultural differences
- Language barriers – even in business

- **Bureaucracy and transparency** is an issue in CEE
- Need a **local partner** to sell
- **Financing** – issues mainly found in state and municipal nursery homes

BREAK

5 MINUTES COFFEE BREAK





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POLAND

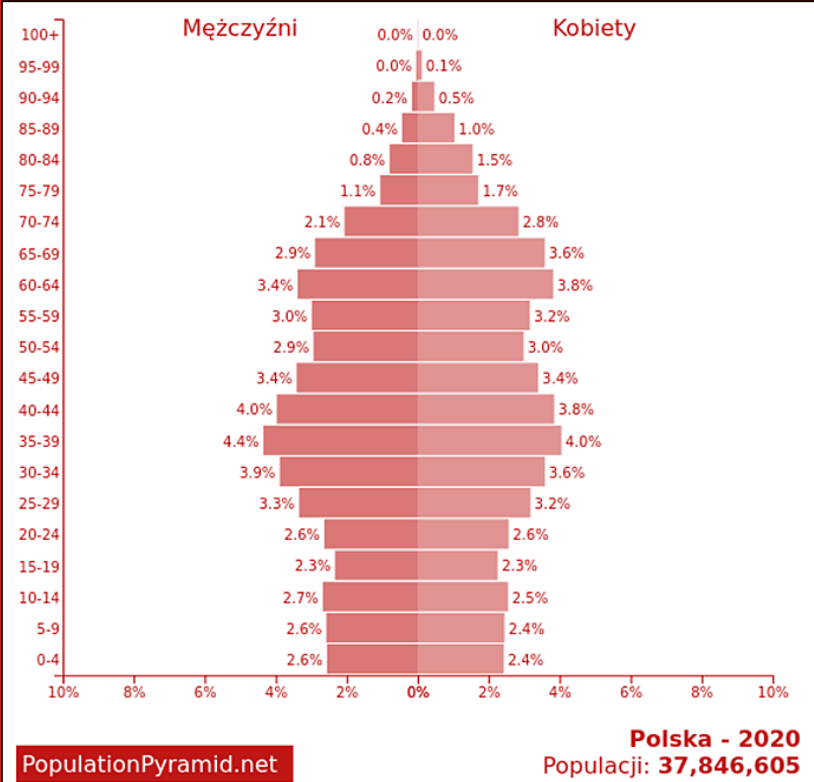
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By The Danish Trade Council - Build on a regional collaboration

MARKET OVERVIEW AND STRUCTURE



DEMOGRAPHIC INDICATORS

POPULATION

- Per January 2021 38.2 millions
- Forecast in 2040 35.7 millions

CITIZENS OLDER THAN 65

- Per June 2020 7.06 millions
- Forecast in 2050 12 millions

AGE FOR GOING TO PENSION

- 60 for women
- 65 for men

STATE PENSION

- DKK 4044 (09.2020)

PUBLIC FUNDS ON THE ELDERCARE

- DKK 32 898 724

LIFE EXPECTANCY

Year	Total		Urban		Rural	
	Males	Females	Males	Females	Male	Females
2019	74,1	81,8	74,5	81,7	73,4	81,8

DETAILS ABOUT THE MARKET

Services offered:

- Residential services provided in medical care units and social assistance sector units.
 - i. **Nursing and care facilities**
 - ii. **Nursing and treatment facilities**
 - iii. **Social assistance homes, family care homes and private care units**
- Community care and day care services provided by the social assistance sector
- Nursing home care services provided in cooperation with primary medical care units and (specialised) home care services provided by the social assistance sector

SOCIAL ASSISTANCE HOMES, WHICH ARE THE MOST COMMON, PROVIDE CARE TO DIFFERENT GROUPS OF RECIPIENTS:

- **OLDER PEOPLE**
- **CHRONICALLY ILL PEOPLE**
- **MENTALLY DISABLED ADULTS**
- **DISABLED CHILDREN**

DETAILS ABOUT THE MARKET

1837 elderly care facilities established in Poland in 2019 with an expected **annual increase** of **7%**

49 branches is found operating accross the country

118.900 beds accross the branches

112.500 residents in stationary welface institutions. 0,5% less than a year before

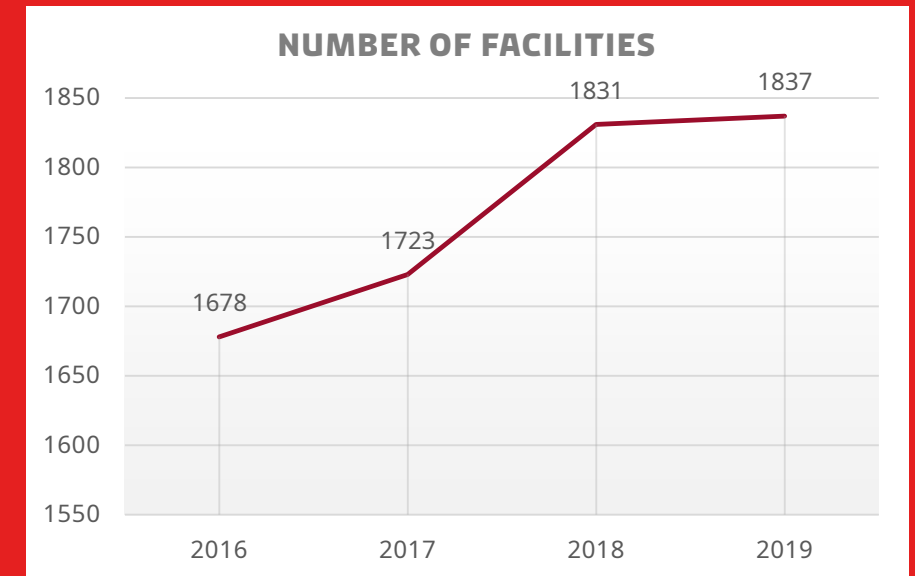
58.600 are men

72,7% were residents of social welfare homes

72.500 are elderly people over 60 years of age. This is the majority of the residents of the social welfare institutions

The growth of private institutions has mainly concerned the **24-hour care facilities**, which constitute the majority of almost 700 private institutions operating in Poland.

EACH YEAR THERE IS ANNUAL INCREASE IN THE NUMBER OF ELDERLY CARE FACILITIES IN POLAND, THE NUMBERS ARE AS FOLLOWS:



DETAILS ABOUT THE MARKET

According to the latest reports, **care for the elderly in Poland is focused on social welfare homes, which are part of the public system.**

Public social care homes account for **43% of the total number** of long-term care facilities for older people and have **over 60% of beds.**

PUBLIC SOCIAL CARE HOMES ARE MOSTLY LARGE FACILITIES BUT SOMETIMES HAVE QUALITY ISSUES. THEREFORE THE NUMBER OF FACILITIES, WHERE PATIENTS HAVE TO PAY FOR THEIR STAY OUT OF THEIR OWN POCKET, HAS BEEN GROWING DYNAMICALLY IN RECENT YEARS



85.0% of people staying in stationary social welfare institutions participated, in financing some parts of their stay in the institutions, covering the costs of living from their own income, e.g. pension or disability pension.

- For 8.0% of the residents, their stay was fully paid by the municipality or the state budget,
- 4.6% of the residents were fully paid by their families,
- and 2.4% of the residents were exempt from payment.

MARKET OPPORTUNITIES IN POLAND

Challenges that need to be addressed

- Residents require monitoring of vital life signs many times a day
- Lack of continuous access to a doctor for sick residents (**need for distant acces**)
- Inhabitants with cognitive dysfunctions - sometimes lost within the facility and outside it (**need for tracking devices**)
- In the event of a fall or fainting, it is essential to inform the staff quickly (**need for fall sensors**)

There is also a need for supportive tools for a person at home instead of moving to a nursing home. **Providing remote support for dependent people so that they can function comfortably in their own home for as long as possible is one of the priorities.**

Possible solution indicated by stakeholders:

- Monitoring of vital signs (pulse, temperature) at home
- Fall sensors with notification of the rescuer
- Psychological support
- Pharmacist support - order and dosage of drugs
- Calling to staff from nursing homes



MARKET OPPORTUNITIES IN POLAND



<https://www.zakladzacisze.pl/>

Non-public Care and Treatment Centre "ZACISZE" Agnieszka Daraż-Pierożyńska "4 BODY"

- *Which products from current suppliers do you consider problematic, defective, in need of replacement?*

MEDICAL EQUIPMENT - BEDS, ANTI-BEDSORE MATTRESSES, BEDSIDE TABLES

- *What products are most often missing in the daily work of the centre?*

EQUIPMENT FOR REHABILITATION

- *What elements in the management of the centre do you find significantly challenging?*

MAKING PATIENTS MORE FUNCTIONAL IN THEIR DAILY LIFE

- *What type of technology do you see as important in developing and improving the effectiveness of daily work with older people?*

TECHNOLOGY IN EQUIPMENT FOR PATIENT IMPROVEMENT, REHABILITATION

- *Would you be interested in exchanging experiences with representatives of similar institutions in other countries in order to increase your knowledge of current, foreign sectoral solutions?*

YES

MARKET OPPORTUNITIES IN POLAND

There is a new tendency to establish more **Daily Care Homes (DDOM)**. They already started activity, which is being financed from EU Funds.

DAILY CARE HOME IS ONE OF THE FORMS OF DEINSTITUTIONALISATION CARE FOR DEPENDENT PERSONS.

The DDOM is a structurally separate part of the therapeutic entity (therapeutic entity providing services in the field of basic health care, hospital treatment or outpatient care).

The most important of these are geriatric clinics or long-term care facilities). A day care home provides also medical care.



DOM DZIENNEGO POBYTU. ŁÓDŹ - UL. PRZYRODNICZEJ 7/9

THE DURATION OF STAY in a daily care home is determined individually by the therapeutic team.

- Not shorter than 30 days
- No longer than 120 days

THE FIRST MONTH patients stay at the daily care home for 5 days a week for 8-10 hours per day

- Depending on the improvement of health, number of days may be gradually reduced depending on the individual needs of each patient
- Cannot be shorter than 4 hours per day.



FINANCING IS AVAILABLE BOTH FROM EU FUNDS AS WELL AS THROUGH DOMESTIC SOURCES.



THERE IS A GROWING NEED FOR HOME CARE SOLUTIONS AS THE AGING POPULATION IS GROWING

GOVERNMENTAL PROGRAMME ACCESSIBILITY PLUS

The programme deals with spheres of social life which so far have not been sufficiently present in the public debate. It addresses **solidarity** towards the weakest as well as the **understanding** and provision of **equal opportunities** for all people with special needs on an equal basis with others.

THE PROGRAMME is based on three main assumptions:

1. Rooted in the principle of the state's subsidiarity towards all social groups
2. A consequence of the sustainable development policy
3. Results from the assessment of social and physical needs

Ambitious programme but takes into consideration the financial reality

DEVELOPMENT of day care services for older people is supported through a governmental programme

- Financed from EU fund and are available for public and private operators

THE CHALLENGES are to develop services and assure the long-term sustainability of newly established centres. These challenges are related to a poor recognition of older people's needs

GOOD TO KNOW

- English is a language universally used by a younger population in Poland. Elderly can have barriers using it, what is simply a remain of the history
- A lot of local distributors of medical products as they have **vast experience in preparing documents for public tender**
- Corruption is on a low level due to specialised services that is responsible for combatting corruption

- The cultural differences as eg. procedures are quite formal, rather more than in Denmark. On the other hand **digital invoice is widely respected**
- Social Healthcare System is based on public contribution but the stay at nursing homes is often partially paid out of own pocket
- **Certificate for medical devices is needed** when devices is designed to have contact with a human body for therapeutic goals



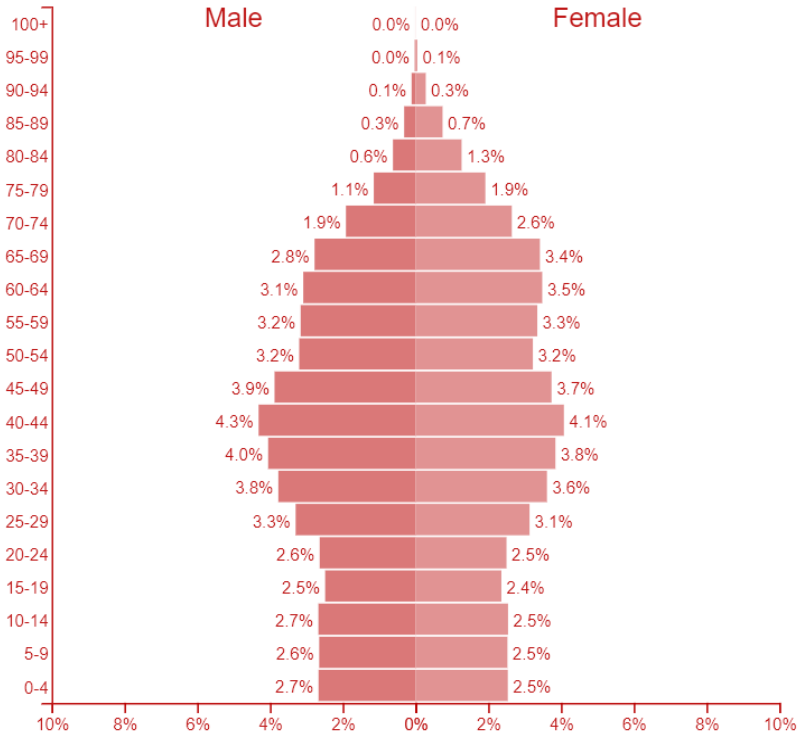
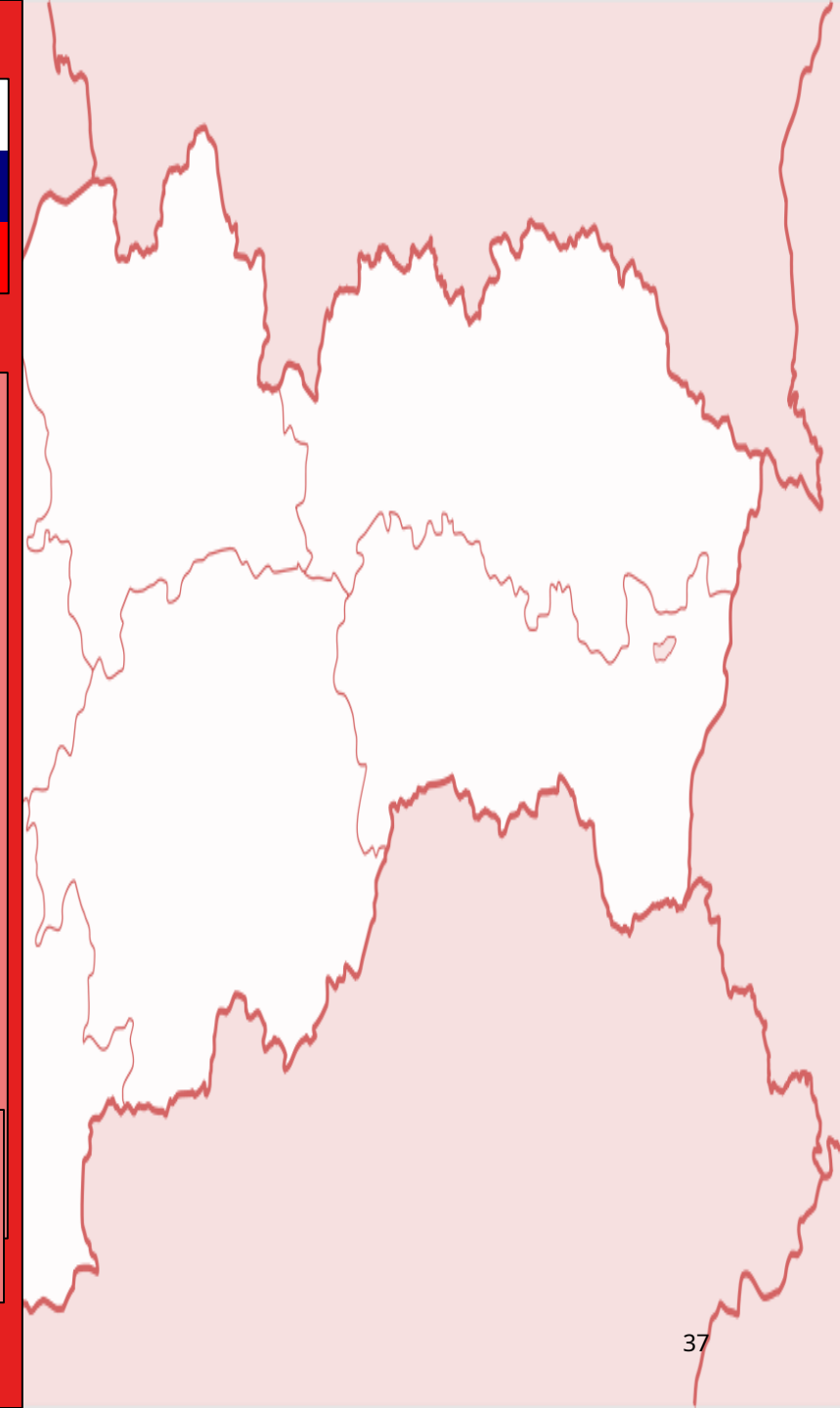
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SLOVAK REPUBLIC

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MARKET OVERVIEW AND STRUCTURE



DEMOGRAPHIC INDICATORS

POPULATION

- 2021: 5.46 MILLION
- 2050 forecast: 4.98 million

CITIZENS OLDER THAN 65

- 2021: 0.850 million
- 2050 forecast: 2.13 million

AGE OF PENSION

- 64 for both men and women

STATE PENSION

- On average, 3629 Dkk

FUNDS ON ELDERCARE

- 0.9% of GDP on eldercare
- EU Recovery Fund: 15 billion DKK

LIFE EXPECTANCY

- Women: 83 years from birth
- Men: 73 years from birth

DETAILS ABOUT THE MARKET

	Beds in 2017	Number of providers	Public providers	Non-public providers	% Non-public providers
Elderly Home <i>Zariadenie pre seniorov</i>	19 068	498	222	276	55,4
Specialized facility <i>Špecializované zariadenie</i>	7 177	228	158	130	57

Care allowance makes the private sector disadvantaged

Private sector and public sector

- Non-public providers: 10% private, 90% NGOs
- The **growth rate of the private sector in Slovakia is significant**, but mainly due to a very low initial capacity and overall underdevelopment of the market.
- The **Slovak public sector** plans to build **1.700 places** in the elderly homes and **2.400 places** in specialized facilities by 2026.

MARKET OPPORTUNITIES IN SLOVAKIA

Challenges that needs to be addressed:

- **Lack of capacity** in eldercare facilities and ageing population with increasing incomes.
- **Lack of employees** in eldercare sector
- **Home care** first (40.505 people)
- Focus on **facilities for less than 40 people**, as Slovakia was previously criticised for having too large facilities.

Mainly opportunities in public and NGO sector

Slovak stakeholders to collaborate with

Elderly Homes Golden Age: Plans to build two new facilities for 1,224,585.48 EUR

Construction of facility for the elderly in Nesvady: 23,321 square meters and 80 beds for 1.5 million EUR, Investor: Cortina Invest a.s.

Construction of the Community Services Center of the Košice: Investor is Košice Municipality. Maximum amount investment: 2 387 033,60 EUR

ProSenior (ADCOMART s.r.o.): specialized portal focused on providing a wide range of products

Seniorpark n.o.



DANISH COMPANIES ALREADY PRESENT IN SLOVAKIA



<https://www.abena.com/>

No former case of Danish eldercare company in Slovakia.

However following companies are **present in Slovak market**

- **Abena A/S** (exclusive distributor in the Czech Republic and Slovakia)
- **Arjo Czech Republic s.r.o.** (covering Slovakia)

OUR HEALTH CARE CONCEPTS



Incontinence >



Baby Diapers >



Gloves >



Skin Care >



Wound Care >



Body Wash >



Bed Protection >



Protective Wear >

What Abena A/S specializes in

GOOD TO KNOW

- Involve the **Slovak Ministry of Labour, Social Affairs and Family** and **Association of Social Care Providers**.
- **Reform** of eldercare financing system is planned (care allowance).
- Use opportunity to **present your products** at trade shows or conferences.

- Slovakia has relatively **low public spending** on long-term care. In 2017, the share of GDP was 0.9%, which is among the lowest expenditure within OECD countries.
- Language barriers



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CEE-ELDERCARE

JOIN:

VIRTUAL EXPORT DRIVE

MAY 17TH – JUNE 17TH 2021

POLAND, CZECH REPUBLIC, UKRAINE, HUNGARY & SLOVAKIA

**MEET KEY STAKEHOLDERS FROM THE CEE-REGION VIRTUALLY AT THE PAVILLON
OF DENMARK ONLINE WITH DANISH.CARE AND THE TRADE COUNCIL.**



**MINISTRY OF FOREIGN AFFAIRS
OF DENMARK**

DANISH.CARE
Trade Association for Assistive Technology

VIRTUELT EKSPORTFREMSTØD TIL 5 LANDE:

EN AF PROJEKTAKTIVITETERNE ER ET 5-TRINS VIRTUELT EKSPORTFREMSTØD TIL DE 5 LANDE I HELE PERIODEN FRA 17. MAJ TIL 17. JUNI, HVOR DEN VIRTUELLE PLATFORM ER ÅBEN FOR INTERNATIONALE BESØGENDE.

FREMSTØDET ER STØTTET AF UDENRIGSMINISTERIET/ THE TRADE COUNCIL MED OP TIL 75%

DER ER PLANLAGT FØLGENDE LIVE EKSPORTFREMSTØDSDAGE MED LANDE-SPECIFIKKE AKTIVITETER (HER BEMANDES STANDENDE I REAL-TIME MED MULIGHED FOR DIREKTE KUNDEMØDER, CHAT, TEAMS MM.):

- **UNGARN: 19. MAJ**
- **TJEKKET: 26. MAJ**
- **POLEN: 1. JUNI**
- **SLOVAKIET: 9. JUNI**
- **UKRAINE: 10. JUNI**
- **STAKEHOLDER MEETUP CEE + DK: 14 JUNI**



OUR TEAM



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