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China and France: Caring for the elderly together 中法携手：共同为老人服务



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INTRODUCTION: CARING FOR AN AGEING POPULATION



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China will soon have the **world's largest senior population**, generating an unprecedented demand for elderly care services (by 2050, 1 in 3 people in China will be over 60).

This demographic shift has been the result of numerous factors, including a baby boom period in the 60's and 70's, the one-child policy, overall improvements in living conditions, and higher levels of education and access to resources. Providing adequate care for highly-dependent people is already a mounting challenge with **more than 10 million Chinese suffering from Alzheimer's disease**.

“In the next 10 years, China will need about 10 million additional nursing home beds while training an elderly care workforce of 10 million.”

Recognizing this demographic revolution and the resulting healthcare challenges, the Chinese authorities have initiated significant reforms to provide a better framework for healthy ageing, including the development of a «silver industry» **targeting both homecare and residential care**.

“In the last 40 years, France has been at the forefront of the development of elderly care in Europe. France's experience in ageing brings a unique accumulation of know-how and a sharp overview of what works and what doesn't.”

French players have taken the lead in developing **innovative high-end solutions for dependent** people, including scientific and sociological studies aiming at promoting elderly people's well-being, health and safety. Today, **French companies are the major leaders of the industry in Europe**.

“France offers a collaborative approach tailored to Chinese specificities.”

1 - FROM HOMECARE TO RESIDENTIAL CARE: FRANCE DEVELOPS THE ELDERLY CARE OF TOMORROW

France's public and private stakeholders share the same approach: **enabling people with physical or cognitive impairment to live healthily and happily, with dignity and respect, in a safe and socially connected environment.**

“Healthy life expectancy for 65-year-old women and men in France are respectively 22.7 and 18.0 years (the highest for women in Europe, and one of the highest for men).”



© ORPEA

With the progress of medicine, health awareness and French authorities' push to develop home care, elderly people, thanks to a multidisciplinary approach, are now able to stay longer « at home », remaining connected to their family and social environment while maintaining a relative autonomy.

Consequently, senior care facilities have been facing the challenge of welcoming residents **with heavier physical or psychological dependencies**, and French players have developed new sets of skills and therapies in order to fully integrate the necessary daily nursing, medical services and rehabilitation to home-like environment.

FRANCE'S ALZHEIMER'S PLAN

Carried out together by public and private players, France has also put in place a series of “Alzheimer's disease plans”, **internationally recognized by Alzheimer Disease International (ADI)**. Introduced in 2014 with funding of EUR1,6 billion, the 4th French Alzheimer's Disease Plan provides a systemic approach with better screening and assessment of the dependency level, comprehensive care bringing together medical, psychological, social and educational solutions, improved support for the families (including financial aid), easier access to specifically designed accommodation and rehabilitation services and additional funding for research (this 4th Plan tackles not only Alzheimer's but also other neurodegenerative diseases).

The main principles driving this approach are to treat disabled elderly equally, regardless of their dependency level.

“Ageing is a priority for French-Chinese cooperation.”

DEEPER INSTITUTIONAL AND TECHNICAL COOPERATION BETWEEN CHINA AND FRANCE

The Chinese and French authorities are strengthening their bilateral cooperation in the field of ageing and geriatrics through joint initiatives, including:

- The training of Chinese managers and social workers
- The exchange of scientific, medical and educational expertise
- A deeper collaboration regarding the implementation of new standards

2 - RESIDENTIAL CARE: THE FRENCH ARE THE MOST ADVANCED PROVIDERS WORLDWIDE

With more than 4 decades of experience, French nursing home operators have developed **original and innovative concepts and solutions** to promote the best quality of life for their residents. ADEF RESIDENCES, ALMAGE, COLISEE GROUP, DOMITYS or ORPEA, among other players, are leading European nursing home operators with **ongoing projects in China** developed together with domestic partners. Their main focus is on **highly dependent seniors** (dementia including Alzheimer's, psychological care, etc.) where China has the biggest needs.



© ADEF RESIDENCES

In China, their caring approach is **specifically adapted to the requirements of Chinese elderly** (building design, food, activities, culture, role of the family, etc.) and brings together:

1. MEDICAL INNOVATION, with care solutions which are individualized according to the situation of each resident (level of dependency, pathologies, physical impairments, etc.). The main objective is to **reduce the debilitating impact of diseases by using innovative medical approaches** which include non-drug solutions such as occupational therapy, luminotherapy or psychomotricity. For this purpose, the life cycle of disease management is essential, from diagnosis, treatment to rehabilitation. Psychological, emotional and relational support is also of the utmost importance and the staff at all levels are trained accordingly.



© ALMAGE

2. QUALITY OF LIFE, with an individualized approach **enabling each resident to feel "at home"** and delivering high-end services covering all daily life activities, from catering to leisure.



© COLISEE GROUP

3. SAFETY, as France has developed **the most stringent standards and management processes in Europe**.

4. THERAPEUTIC AND ELEGANT ARCHITECTURE: from spatial organization to decoration details, the French nursing home operators have a **long experience in planning, designing and delivering facilities fully adapted to the safety and well-being of seniors**. This architectural approach also integrates the medical needs of the residents, and a wide range of IT & smart-home solutions are also implemented to support and monitor the daily activities of all residents while improving management efficiency.



© DOMITYS



© COLISEE GROUP



© ORPEA

THE FRENCH NURSING HOME INDUSTRY: CONSOLIDATING AND EXPANDING ABROAD

The French market is experiencing major structural changes, as people are typically entering care homes considerably later in life and for far shorter periods, while requiring much more specialized care during their stay. Nowadays, **France is the most mature, dynamic and consolidated nursing home market in Europe**, with high occupancy rates (unlike Germany and the UK) and the largest players in the EU. The market is currently expanding, a trend largely driven by the private sector. The leading French operators are also major players abroad through cross-border acquisitions of other European nursing home operators (in Germany, Italy, Spain, Switzerland, etc.) **while also expanding in China.**

“France is the most mature, dynamic and consolidated nursing home market in Europe.”

FRENCH NURSING HOME OPERATORS IN CHINA

ADEF RESIDENCES

ADEF GROUP operates 5 subsidiaries and 104 facilities in France, including 57 medico-social establishments (38 nursing homes have special units for Alzheimer's disease) and 47 social establishments. The aim is to offer personalized and high-quality services to Chinese dependent elderly through our expertise in medical, paramedical, nursing services and non-medical care. After completing successfully a consulting mission on behalf of YUEXIU PROPERTY (a real estate developer based in South China), ADEF RESIDENCES and YUEXIU signed a cooperation agreement in 2018 to operate a medico-social establishment for elderly in Guangzhou.

ALMAGE

ALMAGE ALZHEIMER CENTERS is a French company drawing on the expertise of French professionals in the healthcare industry. Its founders are active in the field of specialized nursing homes dedicated to Alzheimer care and ALMAGE has been caring for Alzheimer's disease patients for over 35 years. The company aims at managing senior-oriented homes on behalf of third parties partners who wish to develop a network of senior-related facilities. In China, ALMAGE has 3 major projects underway in Beijing, Shanghai and Nanjing.

COLISEE GROUP

The fourth largest group in Europe in elderly care, COLISEE has more than 30 years' experience and manages more than 250 medical nursing homes worldwide (France, Germany, Spain, Italy, Belgium & China) while also being active in the fields of rehab clinics & homecare, including special units dedicated to Alzheimer's disease. In China, COLISEE signed in 2014 a partnership agreement with CHINA MERCHANTS GROUP. Its first medical nursing home opened in Guangzhou in February 2018 with 132 beds. Its second project in Shenzhen began its operation in March 2018. These 2 projects under-operation proved COLISEE's high expertise & the quality of its services in China.

DOMITYS

AEGIDE GROUP has become the standard bearer of the Senior Serviced Residences market in less than 20 years. This new concept, which the Group created and markets under the DOMITYS brand, meets the expectations of independent elderly people while attracting a growing number of retail and institutional investors. The Group provides a response to population ageing thanks to its know-how and expertise in 3 lines of business: real-estate development, marketing and operating residences. Building on this unique positioning, it is pursuing its expansion both in France and abroad, exporting a demanding model based on relentless efforts to offer quality services for its residents. In order to develop DOMITYS concept in Asia, and particularly in China, AEGIDE created a JV with ASCOTT GROUP, Hospitality Global Leader.

ORPEA

ORPEA is the World leader in elderly care, with 950 care facilities, totaling more than 96,000 beds across 14 countries. The Group's mission is to take care of people with physical or psychological loss of autonomy, by providing them with the essential nursing and care, in order to ensure their well-being, and respect their dignity and individuality. In China, ORPEA has already opened, alone or through management contracts, 2 facilities for a total of 540 beds. It has also set up a joint venture with the CHINA PACIFIC INSURANCE COMPANY (CPIC), the 3rd Chinese insurance player, in order to operate its senior living and nursing home facilities. CPIC has announced a plan to open 10,000 to 12,000 beds of elderly care facilities in the next 3 to 5 years. ORPEA has also created, together with Beijing Xiehe Hospital, a training program in geriatrics.

3 – ARCHITECTURE AND INTERIOR DESIGN: INTEGRATING THE NEEDS OF RESIDENTS, FAMILIES AND STAFF

A successful nursing home **has to fulfill the needs, well-being and safety of all users** while being **efficiently managed**. This requires a **comprehensive and sustainable approach** for which French architects are well-known, some of them already having a long experience in China in the field of healthcare.

MEDI-CONTRACT GROUP

MEDI-CONTRACT GROUP is a global interior design and layout contractor for nursing and healthcare facilities whose expertise includes interior design, 5 production units for furniture and a textile company specialized in technical fabrics.



© MEDI-CONTRACT GROUP



© AIA LIFE DESIGNERS



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The French expertise in senior care involves an adaptation to the Chinese cultural specificities in partnership with local architects (design, materials, patterns, etc.), and covers all aspects of a project: **energy efficiency, green efficiency, acoustics, comfort, maintenance, operational performance, practicality, flow of people, welcome of relatives, lighting, chronobiology and circadian rhythms**, etc.

FRENCH ARCHITECTS IN CHINA



© AIA LIFE DESIGNERS

AIA LIFE DESIGNERS

Founded in 1965 by a team of architects and engineers, and active in China since 2008, AIA LIFE DESIGNERS is today a major multi-disciplinary consultancy company, providing a full range of combined expertise and services in architecture, interior design, engineering, project management, urban planning and sustainable development. With its collective management of 22 partners and its 650 employees, AIA LIFE DESIGNERS is able to offer a high level of commitment and know-how in sectors where the specificity of the activities and the complexity of the functions require innovation and synergy between architectural design, engineering, and many specialized fields of expertise.



© FREDERIC ROLLAND INTERNATIONAL

FREDERIC ROLLAND INTERNATIONAL

FREDERIC ROLLAND INTERNATIONAL has a long history in China in designing hospitals and nursing homes (Yanda Hospital, Golden Valley Senior Nursing Home, Chinese-Thai Friendship Hospital in Kunming, Pudong Immigration Health Care Center, etc.).



© L'AGENCE FRANÇAISE

L'AGENCE FRANÇAISE

Created by Lankry Architects and Arc.Ame, L'AGENCE FRANÇAISE brings together a multi-disciplinary team including, urban planners, architects, landscapers and designers with the aim to work internationally and with an innovative, sustainable and collaborative approach. L'AGENCE FRANÇAISE has an Innovation Lab dedicated to Senior Care in China and its cultural specificities and is working with a Chinese architect for a senior housing project on behalf of a private investor in Shanghai. The Agency is involved in several Chinese urban sustainable planning projects and has also participated to several competitions.



© PADW

PADW

PADW is a French design workshop founded in 1989 by Gilberto Pellegrino in Nantes. Our team is composed of people with various skills and personalities. Our design covers the following sectors: healthcare, housing, education, childhood, corporate, cultural and urban planning. Since 2015, we have completed numerous projects in China (including Xiangtan Chenhui elderly care centre, Guangzhou Yuexiu elderly care centre, Guangzhou 12th hospital, Guangzhou 3rd hospital, etc.). We work together with renowned Chinese institutes, hoping to share our knowledge and experience, especially in the healthcare sector.

4 - STAFF TRAINING & HOMECARE: AN ESSENTIAL ELEMENT IN ELDERLY CARE

The very core of elderly's well-being **rests on compassionate, genuine and personalized relations with their relatives and caregivers**. Therefore staff training at all levels is of the utmost importance and should integrate **both medical and human skills**.

French stakeholders have developed over the years a strong expertise **which integrates these 2 aspects both in terms of training contents and standards**. They are now engaged in the training of Chinese elderly care professionals both in China and France. Considering the huge challenge faced by China in terms of staff development, **the "Train the trainer" approach** is a key element to nurture the next generation of Chinese professionals.

French expertise covers all disciplinary fields related to ageing, with a strong attention to continuous improvement of protocols and contents and a **multidisciplinary approach** integrating administrative staff and medical professionals:

- **Training of managers specialized in senior care;**
- **Training of all care providers** in the field of geriatrics (physicians, nurses, care assistants, social workers, etc.);
- **Specific training in non-drug therapies**, (including physiotherapy, psychomotricity, art, water and food therapies, etc.);
- **Training of family caregivers**, etc.

"The "Train the trainer" approach is a key element to nurture the next generation of Chinese professionals."

Capitalizing on this expertise in the field of training, French companies provide a broad range of solutions designed to **ensure the comfort and health of the elderly who wish to stay in their own home** well into their senior years.



© EUROP ASSISTANCE

EUROP ASSISTANCE

EUROP ASSISTANCE is a subsidiary of Generali Insurance Group, one of the Fortune 500 companies. It entered the Chinese market in 1989 with branches in Beijing, Shanghai, Guangzhou and Chengdu. In order to uphold our “global presence, local execution” strategy, EUROP ASSISTANCE China has officially begun its footprint in senior care services in 2018. Our iYooCare Health & Senior Care business unit has successfully launched a unique nurse escort platform in Chengdu. Since its beginning, we have provided our home-to-hospital escort services to more than 500 customers in less than 6 months.



© ISRP

ISRP

ISRP is the world leader in the training of psychomotor therapists. In France, it ensures the preparation of nearly half of the state-qualified psychomotor therapists. Thanks to its international agreements and conventions (Europe, Latin America, Africa and Middle East), about ¼ of all psychomotor therapists worldwide have an ISRP certification. In China, ISRP has established collaboration with Shanghai RuiJin Hospital, the Shanghai Rehabilitation Center for the Disabled and the Health Bureau of Yangpu District in Shanghai.

5 - HOSPITALITY MANAGEMENT: CUSTOMIZED SOLUTIONS TO CREATE THE BEST ENVIRONMENT FOR SENIORS

Nursing home operators have **to raise their standards in terms of care and comfort** to meet the demands of their residents, while **keeping expenditures under control**. French hospitality management companies can help on this matter through a dedicated and integrated approach enabling elderly care operators to become more efficient **by outsourcing the services which are not part of their core business** but are still essential to their success. The range of services provided by French facility management companies includes **catering, security, housekeeping, maintenance, energy efficiency**, etc.

A key ingredient for the well-being of residents is food. Meals **provide joy, pleasure and the opportunity to connect with fellow residents and the staff**. A nutritious, flavorful and safe diet is also **a vital part of an integrated healthcare approach**. French hospitality companies managing elderly care establishments in China adapt meals to the taste of Chinese residents.

ADEN

With 20 years of experience in China, ADEN is a leading player in the field of facility management providing one-stop solutions including maintenance, building monitoring, energy efficiency, air purification, security solutions, transportation, HR, catering, cleaning and waste management. ADEN operates in 60 cities in China where it employs more than 23,000 people.



© ADEN

SODEXO

Founded in 1966, SODEXO serves 75 million consumers each day through the unique combination of on-site Services, Benefits and Rewards Services and Personal and Home Services in 80 countries. In China since 1995, SODEXO has proved to be the market leader in designing, managing and delivering comprehensive service solutions integrated with over 100 services for corporate, education and health institutes and seniors' homes. Our 11,000 employees share the same objective: helping companies and organizations in improving their performance and providing a better quality of life for 1.1 million patients and residents.

6 - SMART ELDERLY CARE SYSTEMS FOR CONSISTENT CARE QUALITY

Thanks to decades of experience and millions of elderly users worldwide, French companies already provide **the most advanced and reliable care systems for both institutional care and home care in China**. French expertise includes systems to ensure resident safety (fall detector, bed sensor, etc.) embedded with monitoring tools to **provide consistent care quality and increase efficiency**.

LEGRAND

LEGRAND is the global specialist in building electrics. In China, LEGRAND has 6000+ employees and 40 regional sales offices. With 30+ years' experience, LEGRAND is the leader in smart care for the elderly. Thanks to wireless technology, its solutions improve the efficiency of care services through traceability and scalability and its systems are now installed in over 2,000 facilities in 40 countries. LEGRAND provides a comprehensive smart care solution for both institution operators and home residents.



© LEGRAND



© SENIORADOM

SENIORADOM / SIGFOX

SENIORADOM allows vulnerable, elderly or disabled people to live longer and safely at home while providing respite to their caregivers. SENIORADOM wants to make accessible to every elderly person an intelligent and efficient telecare solution. The solution automatically learns in a few days the lifestyle so that it can automatically adapt itself to the habits and send alerts when something abnormal occurs, even in case of faint.

TERANGA SOFTWARE

Since 2007, TERANGA SOFTWARE is recognized as a leader in French software market for nursing and retirement homes. We develop innovative solutions to provide better care to dependent seniors. Our software NETSoins is suitable for either independent structures or multi-institutions in China.



© TERANGA

7 - REHABILITATION DEVICES: RESTORING FUNCTIONAL ABILITY AND QUALITY OF LIFE

Over the last century, France has also developed outstanding know-how in the field of rehabilitation, with medical devices significantly **enhancing and restoring functional ability and quality of life** for the elderly with healthcare challenges, physical impairments and disabilities. Through clinically-proven technologies, the caregivers can be assured that the appropriate use of the medical devices from French companies is safe and effective in treating elderly patients. French medical device expertise is renowned worldwide for innovation and high quality with the primary objective to **help patients return to normal life as fast as possible**. Restoring the quality of life and autonomy of the elderly has the added benefit of reducing the burden on the healthcare system.

AIR LIQUIDE

AIR LIQUIDE HEALTHCARE is a world leader in medical gases, home healthcare, hygiene products and healthcare specialty ingredients. With more than 13,500 employees in 35 countries around the world, it serves over 7,500 hospitals and clinics, and takes care of 1.3 million patients at home for a variety of diseases such as chronic respiratory diseases, obstructive sleep apnea and diabetes. AIR LIQUIDE HEALTHCARE aims to improve patients' autonomy, adherence to treatment, clinical effects and quality of life.

URGO

URGO is a French leading international healthcare group, specialized in advanced wound care and self-care (first aid, food supplements, colds, allergies, sexual hygiene...). With over 3,100 employees, URGO is present in over 50 countries and on all distribution segments, from hospitals to pharmacies. It generated a turnover of EUR620 M (+8%) in 2015 and is investing thoroughly in its internal R&D and in external partnerships to develop innovative solutions.





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Established in 2013 during the official visit of the French President to China, the **French Healthcare Alliance** brings together (with the support of the French Embassy) **135 French healthcare companies** active in China (including pharmaceuticals/biotech, medical technology and e-health companies, public/private hospitals, nursing home operators, architects, collective services and training providers, research institutes, etc.).

Our aims are:

- To offer **competitive and innovative** products and services meeting the requirements and needs of the Chinese market;
- To develop value added **medical, scientific, financial and commercial partnerships** with local stakeholders (Chinese authorities at the national and local level, investors, hospitals, research institutes, etc.).



The Alliance is organized around **5 thematic areas**:

- Hospital design & management;
- Healthy ageing & elderly care;
- Diabetes and cancers;
- Infectious diseases;
- e-health



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The Association pour un Partenariat Franco-Chinois au service du Grand Âge (Association for a French-Chinese Partnership for Elderly services) called «PFCGA» brings together specialists of the silver industry, managers of nursing homes, training institutions, etc.

The purpose of the Association is to collectively involve its members in China in order to answer the challenges of the elderly.

Our members can provide complete solutions for the elderly, including:

- Home services;
- Services for the elderly in the community;
- Nursing homes for dependent people, with specialized services for people with cognitive impairment (such as Alzheimer's disease).

Your French partner can bring you the following expertise:

- Facility design;
- Management and Operation;
- Training.



FRENCH COMPANIES AVAILABLE FOR CHINESE PARTNERS

RESIDENTIAL CARE



ARCHITECTURE



INTERIOR DESIGN



HOSPITALITY MANAGEMENT



STAFF TRAINING & HOMECARE



SMART ELDERLY CARE SYSTEMS



REHABILITATION DEVICES



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