

MARKET STUDY 2026

Workforce Shortage in Europe's Social Sector

Market Potential of Digital and AI-Enabled Relief Solutions

Europe 2026–2035

Market, investment, innovation and strategy analysis for social-service providers, municipalities, technology vendors, investors and public institutions.

ANALYSIS PERIOD

June - July 2026

DTO - B2B Research & Strategies
Market and Model Analysis

REPORT PREVIEW



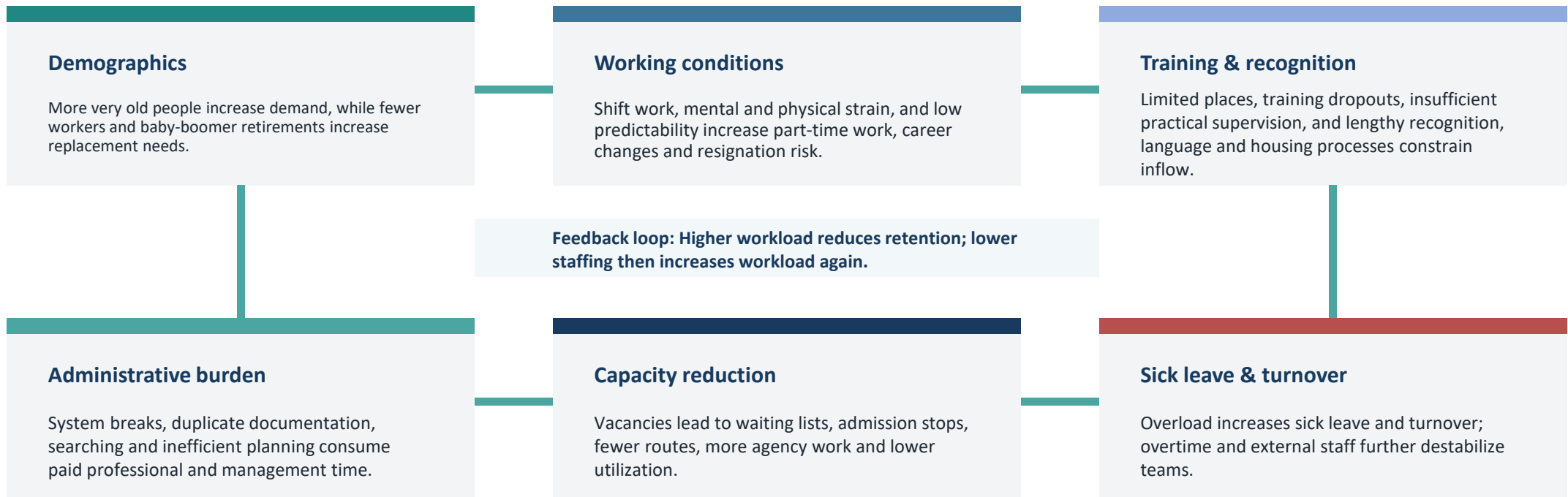
The study links service-delivery pressure, solution markets and investment logic

The route runs from the structural workforce bottleneck through solution and competitive fields to the market model, risks, recommendations and appendix.

01	Market and bottleneck Social sector, subsegments, stakeholders, funding and workforce shortages	08
02	Digital relief Documentation, workforce, case management, telecare, sensors and AI	16
03	Demand and competition Customers, procurement, vendor groups, partnerships and consolidation	22
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The workforce shortage is self-reinforcing—organizational friction accelerates turnover and capacity loss

Demographics, working conditions and administrative friction reinforce each other and drive capacity loss through turnover.



Market implication: An hour saved is more than productivity—it can reduce rework, errors, overtime and resignation risk, thereby stabilizing service capacity.

The market is evolving from point solutions to integrated operating platforms centered on the digital case record

The digital case record is becoming the platform core connecting documentation, workforce, communication, telecare, AI and services.

Documentation & administration	Care/case documentation, voice input, forms, service records, billing and deadlines very high demand fast ROI low-medium risk	Workforce & deployment planning	Shift planning, routes, skill matching, absence, tariff and capacity management direct capacity lever high scalability
Communication & coordination	Handovers, secure messaging, family portal and seamless authority coordination high use integration and role requirements	Case management & professional decisions	Case records, knowledge management, quality checks, risk alerts and participation planning high retention medium-high risk
Recruiting & training	ATS, international placement, recognition, onboarding and microlearning shortage-driven bias and integration risk	Telecare & assistance	Emergency calls, sensors, remote support, reminders, family platform and control center volume market local installation and service
Generative AI & data	Transcription, summarization, translation, plain language, search and extraction very high growth human approval required	Integration & advisory	Interfaces, migration, process design, identity, information security and managed services high demand project-based, locally scalable

Interpretation: Whoever controls digital case records, master data, service records, roles and identities holds the strategic control point for cross-selling planning, communication, AI and analytics.