

Quarterly Home Care BDO Sector update

2025 Snapshot



The Irish Home Care Sector

Overview of Home Care in Ireland

Home care is a vital component of the continuum of care, offering a unique set of services that support individuals in their own homes, which can be particularly beneficial for older people, adults with disabilities, and children with complex care needs.

Provision of Services in Ireland



In Ireland, individuals can access home care services through either private or public funding.

If public funding is granted, the service delivery can be provided either by the HSE (direct) or by engaging a private or voluntary organisation (indirect however publicly funded).

Alternatively, individuals have the option to secure home care services privately, independent of HSE involvement.

The table below shows how publicly funded care provision is split between the HSE and outsourced services, highlighting the role of private and voluntary providers.

Category	Details*
Expected Older Persons Home Support Hours	24.3million (m) hours (2025) to c.60,000 persons
Direct Provision by HSE	37% of care hours
Outsourced Care Hours	63% outsourced to private and voluntary providers
Disability Services	Funded through Community Healthcare Organisations
Disability Care Provision	80% delivered by non-statutory sector
Disability Support Hours	3.8m HSE funded hours (2025)
Children's Services	Funded by the Government as approved in the HSE annual National Service Plan

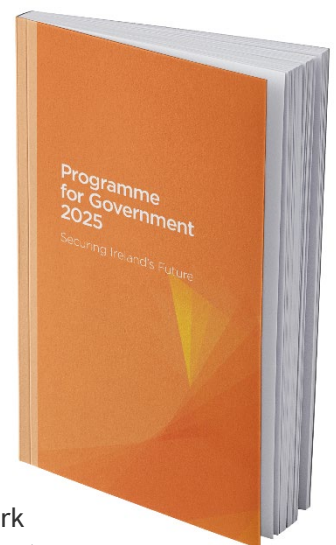
Government Policy in Home Care

Sláintecare (launched in 2017), is a strategic initiative aimed at transforming Ireland's health and social care services, which advocates for providing the 'Right Care at the Right Place, at the Right Time' for users.

The Government's 2025 programme focuses on enhancing home care services to ensure individuals can remain in their homes for as long as possible.

Key initiatives include:

- Design a Statutory Homecare Scheme (includes a new regulatory framework for the home care sector, providing a statutory entitlement to uniform home care services to the public)
- Increase home care hours
- Continue to support Community Healthcare Networks
- Publish a National Action Plan for the delivery of care to older people that will take account of the work of the Commission on Care
- The phasing out of the means test for carers over the life of the Government.



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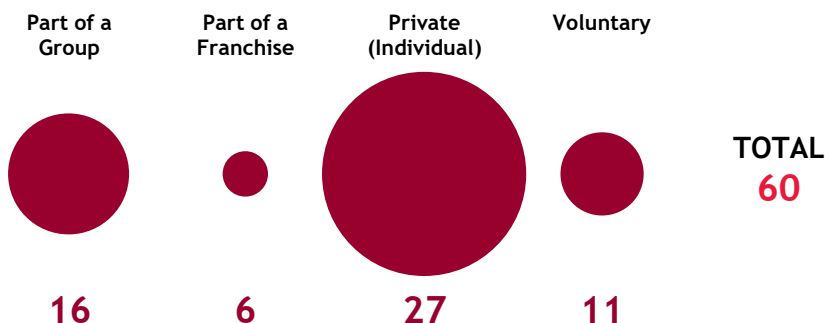
Home Care Sector at Present

HSE Authorised Service Providers

In 2023, the HSE and Department of Health jointly launched the Home Care Authorisation Scheme, which establishes standard operating procedures that home care providers shall comply with, in order to maintain their status as authorised home care providers. The Health Information and Quality Authority (HIQA) is also developing for publication, the National Standards for Home Support Services.

The launch of the Home Care Authorisation Scheme is understood to have played a major role in the entry of several newly authorised operators into the publicly funded home care market with a total of 60 operators (excluding members of consortiums) now approved to operate under the Authorisation scheme.

Summary of HSE's Approved Provider List 2024 (based on BDO analysis)



LATEST STATISTICS *

€31.47

Authorisation scheme basic rate per hour paid to operators while an increase is anticipated in the short term

60

Approved providers

€838 million

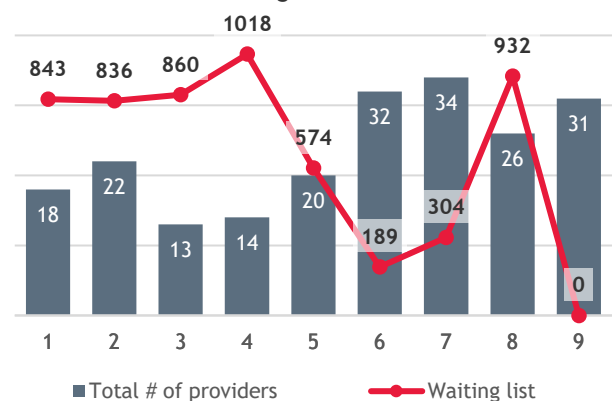
2025 budget allocation for Home Support Services

Recent developments in Waiting list **

As of December 2024, the waiting list of older persons waiting for Home Support was recorded at 5,556. This was a reduction of 307 persons / 5% compared to December 2023, notably aligning with the 5% increase in home support hours delivered by the HSE in 2024 compared to 2023.

A recent publication by the Home and Community Care Ireland (HCCI) outlines that high waiting lists are consistently evident in rural areas and further outline the differences in waiting lists based on the geographical location of an individual which may impact their access to home care.

Approved Providers operating in each CHO vs waiting list as of 2024



Outlook

The home care sector in Ireland is experiencing robust growth driven by increasing demand for personalised care services and Government support for ageing populations.

Care delivery has been impacted by issues such as workforce shortages amongst others and this has presented challenges for the sector however this also presents opportunities for operators for innovation and investment within training and technology solutions.

Such innovative adoptions will be important in preparedness for expected regulatory requirements in the sector.

Given the demand outlook for home care services, whereby home care is often the preference of the State and older persons in advance of requiring residential care, external capital is now plentiful and available for deployment to ambitious home care operators seeking to expand their offering.

BDO have assisted many operators with their growth plans, should you wish to discuss access to capital or routes to achieving growth specific to your circumstance, please contact any member of the BDO Home Care team.

FOR MORE INFORMATION:



STEPHEN O'FLAHERTY
Partner
Corporate Finance
soflaherty@bdo.ie



SHONAGH SHEAHAN
Senior Manager
Corporate Finance
ssheahan@bdo.ie

CONTENT CREATED BY:



SANJULA SAHADEVAN
Assistant Manager
Corporate Finance
ssahadevan@bdo.ie

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