

CHALMERS



Assisted Living

Housing for an Ageing Population

*Master of Science Thesis in the Master's Programme Design and Construction
Project Management*

ELIN CHYTRAEUS
SOFIA HELTE

Department of Civil and Environmental Engineering
Division of Construction Management
CHALMERS UNIVERSITY OF TECHNOLOGY
Göteborg, Sweden 2011
Master's Thesis 2011:32

MASTER'S THESIS 2011:32

Assisted Living
Housing for an Ageing Population

*Master of Science Thesis in the Master's Programme Design and Construction
Project Management*

ELIN CHYTRAEUS

SOFIA HELTE

Department of Civil and Environmental Engineering
Division of Construction Management

CHALMERS UNIVERSITY OF TECHNOLOGY

Göteborg, Sweden 2011

Assisted Living
Housing for an Ageing Population

*Master of Science Thesis in the Master's Programme Design and Construction
Project Management*

ELIN CHYTRAEUS
SOFIA HELTE

© ELIN CHYTRAEUS, SOFIA HELTE 2011

Examensarbete / Institutionen för bygg- och miljöteknik,
Chalmers tekniska högskola 2011:32

Department of Civil and Environmental Engineering
Division of Construction Management
Chalmers University of Technology
SE-412 96 Göteborg
Sweden
Telephone: + 46 (0)31-772 1000

Department of Civil and Environmental Engineering Göteborg, Sweden 2011

Assisted Living

Housing for an Ageing Population

*Master of Science Thesis in the Master's Programme Design and Construction
Project Management*

ELIN CHYTRAEUS

SOFIA HELTE

Department of Civil and Environmental Engineering

Division of Construction Management

Chalmers University of Technology

ABSTRACT

The increasing number of senior citizens in the Swedish population creates new needs and demands on housing. A large part of the existing housing stock in Sweden is not built for seniors to age in, thus creating a market for housing alternatives adapted for an aging population (Socialstyrelsen, 2009a). Today, there is a large difference between the existing housing options for seniors. Senior housing, in the ordinary housing market, implies an independent life, whereas nursing homes and sheltered housings are means-tested and only intended for people with need for assistance during most hours of the day.

In 2006, the government appointed a delegation of housing for seniors, which presented the concept of assisted living (SOU 2008:113). The concept calls for housing with elevated accessibility, common areas to enhance social interaction, and a service personnel a few hours a day. In assisted living the tenant has to be above the age of 70 years. The delegation also proposed an investment support to build assisted living. Based on the previously stated criteria, the support is valid until the end of 2011.

The purpose of the thesis is to map the current market of housing alternatives for seniors in Göteborgsregionen, and to analyze how a project development company can enter the market of assisted living. Factors that affect the market's development, such as requirements from municipalities are also examined. Public documentation generated by the municipalities has been analyzed, and qualitative interviews have been carried out with representatives from health and care administration in the studied municipalities, as well as relevant actors of the market. Moreover, key employees in relation to assisted living, at a project development company have been interviewed.

The study shows that there is an ambiguity concerning the concept of assisted living in the industry. The municipal responsibility to provide, or support, assisted living is unclear, as no real projects have been executed yet. However, it can be concluded that there is a large upcoming target group, thus a probable demand. From a project developer's point of view, assisted living may not only be a successful project, but can also benefit other areas of a business. Further studies regarding the actual demand, and the role of the municipality is recommended.

Keywords: Assisted living, Project development, Senior housing,

Trygghetsbostäder
Boende för en åldrande befolkning

Examensarbete inom Design and Construction Project Management
ELIN CHYTRAEUS, SOFIA HELTE
Institutionen för bygg- och miljöteknik
Avdelningen för Construction Management
Chalmers tekniska högskola

SAMMANFATTNING

Sveriges befolkning över 65 år kommer att öka kraftigt de kommande åren, vilket ställer nya krav på boendeformer. En majoritet av de äldre bor idag i hus och lägenheter som inte är anpassade för att åldras i, vilket skapar möjligheter och en marknad för alternativa boendeformer som kan möta behoven för ett bättre anpassat boende. Idag är det en stor skillnad mellan de befintliga boendalternativen för äldre. Seniorboende i den ordinära bostadsmarknaden innebär ett självständigt boende medan vård- och omsorgsboende samt servicehus är biståndsprovade och därför enbart avsett för personer i behov av vård större delen av dygnet.

För att utreda boendefrågan tillsatte den svenska regeringen 2006 Äldreboendedelegation som senare presenterade begreppet trygghetsbostäder. Konceptet innebär ett boende i den ordinära bostadsmarknaden, med förhöjd tillgänglighetsstandard, gemensamma ytor för att främja social interaktion, samt tillgång till en service person några timmar om dagen. Trygghetsbostäder vänder sig till personer som har fyllt 70 år. Utifrån dessa kriterier finns fram till december 2011 ett investeringsstöd för byggnation av trygghetsbostäder.

Syftet med examensarbetet är att kartlägga marknaden av bostäder för äldre i Göteborgsregionen, och att analysera hur ett projektutvecklingsföretag kan dra nytta av marknadspotentialen för trygghetsbostäder. Vidare har faktorer som påverkar utvecklingen av marknaden analyserats, såsom kommunernas krav och kriterier för trygghetsbostäder. Dokumentation tillhandahållet av kommuner har analyserats och kvalitativa intervjuer har hållits med representanter från vård- och äldreomsorgen i de undersökta kommunerna. Dessutom har relevanta aktörer på marknaden samt anställda på ett projektutvecklingsföretag, med intervjuats.

Studien visar att det råder en oklarhet hos de olika aktörerna angående vad begreppet trygghetsbostäder innebär. Det pågår även diskussioner i kommunerna kring deras ansvar att tillhandahålla, eller finansiellt stödja, utvecklingen av trygghetsbostäder. Det konstateras att det finns en växande målgrupp, och därmed en sannolik efterfrågan. Utifrån projektutvecklingsperspektiv finns det möjligheter att utvecklingen av trygghetsbostäder kan gynna andra delar av företaget, genom exempelvis byggrätter för andra projekt. Vidare studier avseende kommunernas roll och den verkliga efterfrågan är att rekommendera.

Nyckelord: Projektutveckling, Seniorboende, Trygghetsbostäder.

Contents

ABSTRACT	I
SAMMANFATTNING	II
CONTENTS	III
PREFACE	V
LIST OF TERMS	VI
LIST OF TABLES	VIII
LIST OF FIGURES	IX
1 INTRODUCTION	1
1.1 Purpose	2
1.2 Delimitations	2
1.3 Presentation of the Case	3
1.4 Outline of the Report	3
2 METHOD	4
2.1 Methodological approach	4
2.2 Case Study	4
2.2.1 Empirical data	5
2.2.2 Analysis	7
3 FRAME OF REFERENCE	8
3.1 SWOT Analysis	8
3.1.1 Analyzing Internal Resources	9
3.1.2 Analyzing External Factors	9
3.2 Strategic Direction	12
4 MARKET CHARACTERISTICS AND DOMINANT FEATURES	14
4.1 Governmental Process and Decisions	16
4.2 Existing Housing Market for Seniors	17
4.2.1 Concept Living	18
4.2.2 Senior Housing 55+	19
4.2.3 Assisted living 70+	20
4.2.4 Sheltered housing	20
4.2.5 Nursing Home	21
5 MARKET SITUATION IN THE ANALYZED MUNICIPALITIES	22
5.1 Göteborg	24
5.2 Partille	27
5.3 Alingsås	29

5.4	Mölndal	31
5.5	Kungälv	33
5.6	Kungsbacka	34
5.7	Summary	37
6	REVIEW OF THE PROJECT DEVELOPMENT COMPANY	38
7	DISCUSSION AND ANALYSIS	40
8	CONCLUSIONS	47
9	REFERENCES	48
	APPENDIX	52

Preface

This master's thesis has been conducted at the division of Construction Management at Chalmers University of Technology from Jan 2011 until June 2011.

Firstly, we would like to take the opportunity to thank our supervisor at Chalmers, Ann-Charlotte Stenberg, for guidance, support and thoughtful insights during the project. We greatly value the time you have spent reading and commenting the report throughout the thesis work.

The thesis has been carried out in collaboration with Skanska Commercial Project Development in Göteborg. We would like to thank our supervisor at the company, Mats Björk, together with Jan-Åke Svensson, Nicklas Armus and Henrik Olsson for discussions and feedback along the project.

To our opponents, Fredrik Andersson and Johan Johansson, thank you for thoroughly reading, commenting and suggesting improvements through the project. It has been of great value when writing the report.

Gratitude is also shown to our interviewees for taking the time and participating in the interviews. Without the interviews, the project could not have been carried out.

Göteborg June 2011

Elin Chytraeus

Sofia Helte

List of Terms

In the literature concerning senior housing, many different terms and definitions are used. In the reports “Bo bra hela livet” and “Bo för att leva” a common terminology is adapted in order to clarify when to use what term (SOU 2008:113; SOU 2007:103, 2007). In Table 1, the terms relevant for this report are presented with a Swedish translation and an English description. Unless stated otherwise, the translation and explanation is according to the terminology in SOU 2008:113 and SOU 2007:103.

Table 1 List of terms used in the report.

English	Swedish	Explanation
Seniors	Äldre/Äldre personer	People above the age of 55 years.
Senior housing	Seniorboende	Ordinary housing for people above a certain age, usually 55+.
Nursing homes	Vård- och omsorgsboende	Care facility means-tested in accordance to the Social Services Act.
Assisted living	Trygghetsboende	Housing with special attention to accessibility, common areas and supportive service personnel. The user has to be 70+. There is no unanimous term, but assisted living was found the most suitable. Translation by the authors.
Sheltered housing	Servicehus	Independent apartments with access to 24 hours care. Often closely connected to a nursing home. Services such as meals are often offered. Translation by the authors.
Concept living	Konceptboende	Housing based on a certain idea or lifestyle. Translation by the authors.
Collaborative housing	Gemenskapsboende	Aiming for a wide range of ages and usually shares an idea of communal living with a central focus on social gatherings. Translation by the authors.
Home care	Hemvårdnad	Health care in the own apartment or house.
Home services	Hemtjänst	Support when it comes to personal care and services in the own housing.
The policy of staying longer at home	Kvarboendepincipen	The intention to care for seniors in their home for as long time as possible.

Transitional living	Mellanboendeformer	Housing in the ordinary housing stock, which is not means-tested, including assisted living, senior housing and collaborative housing (Klingberg & Hermansson, 2010).
Long term leasing agreements	Blockhyra	The municipality leases entire houses or common areas in buildings during a long period, often 20 years. Translation by the authors.
LOV	Lagen om valfrihetssystem (SFS 2008:962)	The law entitles care takers to choose their own care operator independently of what the municipality offers.
Social Service Act	Socialtjänstlagen (SFS 2001:453)	Law regulating care for seniors, children, and physically challenged.
Health and Care Administration	Vård- och omsorgsförvaltning	The municipality authority responsible for health and care for children, physically challenged and seniors (SKL, 2009).
The National Board of Health and Welfare	Socialstyrelsen	The government agency responsible to ensure good health, social welfare and high quality care (SKL, 2009).
County administration board	Länsstyrelsen	Authority responsible for evaluating investment support applications (SKL, 2009).
The Swedish National Board of Housing, Building and Planning.	Boverket	The central government authority for town and country planning, management of land and water resources, building and housing (Boverket, 2011).
The Swedish Institute of Assistive Technology	Hjälpmiddelsinstitutet	The national resource centre for assistive technology and accessibility for persons with disabilities (Hjälpmiddelsinstitutet, 2011).

List of Tables

<i>Table 1</i>	List of terms in the report	VI
<i>Table 4.1</i>	The population of people above the age of 65 in the analyzed municipalities 2010	15
<i>Table 4.2</i>	The predicted population of people above the age of 65 in the analysed municipalities 2020	15
<i>Table 5.1</i>	Criteria for assisted living	24
<i>Table 5.2</i>	Approach to assisted living in the studied municipalities	37

List of Figures

<i>Figure 1</i>	Structure of the thesis report	3
<i>Figure 2.1</i>	Work process of the thesis	5
<i>Figure 2.2</i>	The areas represent the four interview categories	6
<i>Figure 3.1</i>	SWOT analysis	8
<i>Figure 3.2</i>	Porter's Five Forces Framework	11
<i>Figure 3.3</i>	The PESTEL-analysis	12
<i>Figure 3.4</i>	The product-market growth matrix	13
<i>Figure 4.1</i>	The population structure in the studied areas	14
<i>Figure 4.2</i>	Timeline for the governmental process	16
<i>Figure 4.3</i>	The different housing categorizes for seniors	18
<i>Figure 5.1</i>	The strategies of Senior Göteborg	26
<i>Figure 7.1</i>	The product-growth matrix with assisted living positioned	42
<i>Figure 7.2</i>	SWOT-analysis for a project developer within the market of assisted living.	44

1 Introduction

The increasing number of old people in the Swedish population creates new needs for adjusted living. However a large part of existing houses in Sweden are not adapted for seniors to age in (Socialstyrelsen, 2009a). An option is to live in senior housing complexes 55+, most often condominiums where extra attention has been put on accessibility. When the need for care is greater, and a person needs twenty-four hours attention, the municipalities offer housing and care in nursing homes. However, there is no option to choose from between senior housing 55+, where people live independently, and nursing homes, where the tenants have large needs for assistance. Therefore, the government appointed the Delegation of Housing for Senior that presented the concept of assisted living as an alternative housing to further explore.

According to the National Board of Health and Welfare, there are today many seniors living in “temporary housing” while waiting for available proper housing or housing in nursing homes (Socialstyrelsen, 2009b). This provides opportunities in the housing market to develop new living concepts in order to meet the increasing demand of housing where it is possible to age and still live independently. The upcoming seniors in Sweden are generally wealthy and accordingly have high expectations and requisites regarding housing and service (SOU 2002:29). A shift in attitudes concerning awareness of housing alternatives, and payment willingness, can also be noticed among the aging population (Ahlström, 2008).

In 2009, Sweden had 494 000 persons above the age of 80 years, which represents 5.3 percent of the total population. Statistics Sweden predicts the number to increase in the coming years, and reach 800 000 in 20 years from now (Statistiska Centralbyrån, 2010). The increasing number is both due to higher life expectancy, and the large number of births during 1940's. Moreover, approximately 25 percent of the entire population will be above the age of 65 in 2060 (Statistiska Centralbyrån, 2010). This means the municipalities' costs for care will increase

Today most municipalities practices the policy of staying longer at home, which means that seniors should have the possibility to age and be cared for in their homes for as long time as possible. In the 1990's the organization and coordination of care for seniors was changed in Ädelreformen, enforced in 1992 (Ahlström & Nilsson, 2007). According to the reform, the responsibility for care of senior citizens was transferred, from the county council, to the municipalities, which then became the responsible authority for nursing homes, and to provide accurate care for seniors (Ahlström & Nilsson, 2007).

Nowadays, housing for seniors is not just an issue of the health and care administration, but an urban planning and market issue as well (Göteborgs Stad, 2006). According to Göteborgs Stad (2006), the housing sector is likely to obtain greater responsibility for housing of seniors due to the ageing population. Therefore, collaboration between municipalities and housing companies needs to be improved.

The market for senior housing, in general, is not very well developed and the competitiveness is rather low, which makes it possible for new actors to enter the market (Ahlström, 2008). The difference between the two existing housing options for seniors, i.e. senior housing 55+, and nursing home, is large and the need for an alternative is increasing from the municipalities in Sweden (Klingberg & Hermansson, 2010). The concept of assisted living was introduced in 2007 in the governmental report “Bo för att leva” (SOU 2007:103). As of today, there is a

governmental investment support for assisted living with the following requirements (Boverket, 2010);

- High accessibility standard making it possible for the tenant to age in the housing.
- The applying person must be above the age of 70.
- Focus on common areas in order to improve social life of seniors.
- Service person a few hours every day to assist the tenants.

However, there has been little research within the field of assisted living since it is a fairly new concept. What the concept of assisted living actually entitles, i.e. how it is interrelated to the responsibility of the municipality, and how project developers should relate to assisted living, has not been examined in previous research, thus calling for further attention.

1.1 Purpose

The purpose of this master's thesis is to map the current market of housing alternatives for seniors in Göteborgsregionen, and to analyze how a project development company can enter the market of assisted living in Göteborg, Partille, Alingsås, Mölndal, Kungsbacka and Kungälv.

To fulfill the purpose, the following research questions guided the research:

- What are the conditions of the current market of assisted living and what factors affect the development of the market?
- What requirements do the municipalities have for assisted living?
- How well can a project development company cope with the assisted living market?

1.2 Delimitations

In the thesis, the perspective of a project development company is assumed, and views assisted living from a business perspective, in order to fulfill the purpose of analyzing how a project development company can enter the market of assisted living.

The thesis has been geographically limited to the municipalities of Göteborg, Partille, Alingsås, Mölndal, Kungsbacka, and Kungälv, since it constitutes a well-defined market. These municipalities were also chosen because of their location in relation to Göteborg. The areal limitation provides a comprehensible thesis with a combination of large and small municipalities.

In the definition of assisted living, stated in the governmental report "Bo för att leva", assisted living is mentioned as condominiums, rental apartments or collaborative rental apartments (SOU 2007:103). However, this thesis does not examine the question of ownership and the consequences thereof.

A housing concept can be seen as a product, but also as a service provided to the tenant or owner. In developing a housing concept, the services connected to the housing, e.g. household services, is a strong competitive force. However, in this thesis the main focus will be on the product as such, since it suits the scope, purpose and timeline of the study, which otherwise would have been too extensive.

1.3 Presentation of the Case

The project development company studied in this thesis is part of a global construction group operating in Europe, USA and Latin America. The global construction group has four main business streams; Construction, Residential Development, Commercial Property Development and Infrastructure Development.

The function of Commercial Project Development, which this study has focused on, is linked to the support function marketing, connected to the construction business stream. The Commercial Project Development department is responsible for developing new projects in the section between residential and purely commercial buildings. Examples of such projects are care facilities, nursing homes, schools, and possibly assisted living.

Among other strategies, the project development company aim to focus on core businesses in construction and development, as well as being an international company, with a leading position in selected home markets (Skanska, 2011). The studied case company is here on referred to as the project development company in the thesis.

1.4 Outline of the Report

In the report the structure shown in Figure 1 is used.

Chapter 1 outlines the introduction with purpose, delimitations and a presentation of the company studied in the thesis.

Chapter 2 presents the method used in the thesis. The methodology, as well as how the study has been conducted is explained.

In Chapter 3, the frame of reference is outlined. The theory of SWOT analysis, including a review of factors affecting the context of assisted living, internal resources, and strategic direction are presented.

In Chapter 4, 5, and 6, the findings of the thesis are outlined. Chapter 4 presents the analysis of the current market, followed by the analysis of the studied municipalities, and Chapter 6 presenting a review of a project development company.

In Chapter 7, the findings are discussed and analyzed in relation to theory and sorted by the research questions.

Finally, Chapter 8 presents the conclusion of the thesis.

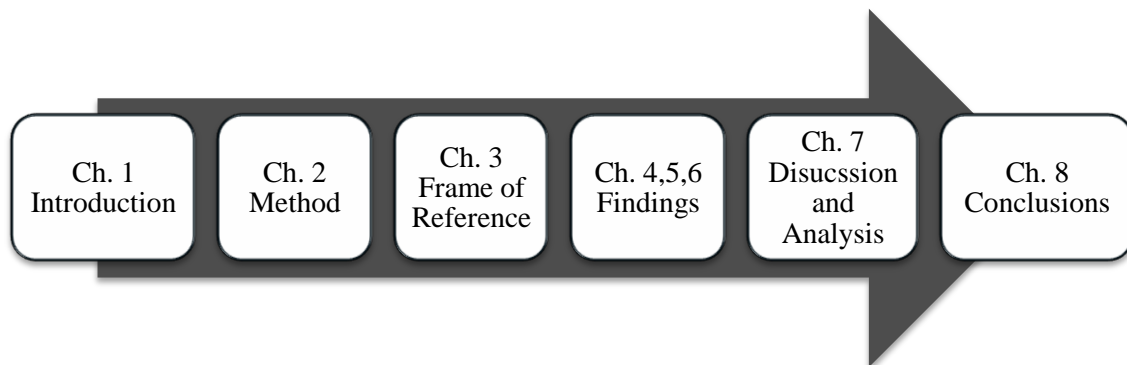


Figure 1 Structure of the thesis report.

2 Method

In this chapter, the relevant methodology, and the method used in the thesis is explained.

2.1 Methodological approach

In general, there are two approaches to a research study, qualitative and quantitative. The two approaches can be used separately or in combination. The basis of qualitative research methods is interviews, and methods to analyze the interviews. In a qualitative interview study, knowledge is produced in the interface between interviewer and interviewee (Silverman, 2000). As compared to qualitative research, quantitative methods are many times preferred when measuring or counting data since it generates a higher scientific reliability than immeasurable data (Lakshman, 2000).

The choice between the two research methods, i.e. quantitative and qualitative, should be based on what the researcher is trying to find out (Silverman, 2000). Qualitative research is preferred for this study as it is explorative and has a holistic focus. Qualitative research is also more process oriented rather than outcome oriented, which is well suited for this study, as it explores a new market. Additionally, qualitative research is more appropriate than quantitative research since interviews are seen as a good method to find out what someone knows or think about a specific issue (Merriam, 2006). According to Silverman (2000), a common belief of qualitative research is that it provides a deeper understanding of social phenomena than quantitative methods. For these reasons, a qualitative approach is chosen to fulfil the purpose of the thesis.

2.2 Case Study

Having chosen a qualitative approach, different methods can be used for the study. From the proposed research questions and a brief study of the context in which the problem is set, the most suitable research method was found to be a case study. Why a case study is the most preferable method will be further explain in the text below.

The definition of a case study is, according to Yin:

“... an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident” (Yin, 2003, p.13).

The definition of a case study, presented above, describes the issues associated with the market of assisted living, as a new concept with undefined boundaries and context.

A case study has the opportunity to give a holistic view of a complex situation as well as gaining new knowledge within a subject (Stake 1995). For this reason, the case study is most suitable when analyzing the complex market in which the study is set.

The characteristics of a case study can differ as much as cases differ from each other. In general, it can be described as descriptive, explanatory or exploratory. The approach can also be either inductive or deductive. All of these characteristics play an important role when designing the study. To assure that the study is designed in an efficient way, the development has followed the five steps presented by Yin (2003); study questions, proposition or purpose, unit of analysis, logic linking the data to the proposition, and criteria for interpreting the findings.

As this study is explorative and somewhat descriptive, a case study fits the purpose and scope of the study. Qualitative interviews pose as the foundation of the case study, and the data collection will be described further in the next section.

2.2.1 Empirical data

Sources of evidence in a case study are usually divided into six different categories; documentation, archival records, interviews, direct observations, participant observation and physical artefacts (Yin, 2003). This study has focused on two sources of evidence, i.e. documentation and interviews, as they are most suitable in order to respond to the purpose of the thesis. As the market of assisted living is new, interviews with actors in the presumable market, is found to be the most valuable source of evidence, and it is in line with the case study method of using a qualitative approach. See Figure 2.1, where the work process of the thesis is explained.

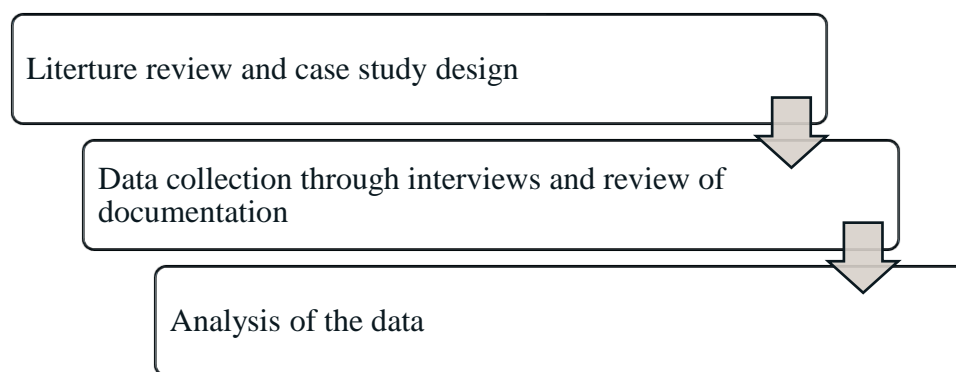


Figure 2.1 Work process of the Thesis

Documentation

Documentation used in the study comprises public material, generated by the municipalities, regarding population forecasts, and senior living options in the different municipalities. In addition, demographical statistics, as well as websites has been used to collect information. As stated by Yin (2003), the documentation is used to substantiate, and authenticate what is discussed in the interviews. The documentation used has not been produced for the purpose of this case study; therefore it is important to have the original purpose and receiver in mind during the analysis (Yin, 2003).

Furthermore, the thesis involves a literature review of previous research in the field of assisted living and senior housing. The research has been conducted through database searches concerning the keywords of senior housing, assisted living, and sheltered housing.

Qualitative Interviews

The thesis has an inductive approach, i.e. the researcher starts with observations and results, which then leads to a theory (Silverman, 2000). In high-quality reflective interviews, questions that serve as a basis for the interview should be carefully prepared. Follow up questions should then be raised since they often generate the most interesting reflections (Thomsson, 2002). As for the validity of the study, it is necessary to point out that the results from interviews are not objective, but based on individual perspective. This creates space for individual interpretations for the interviewer who must undertake a critical view (Thomsson, 2002). The temptation for

an interviewer is to fill in the gaps and read between the lines (Schostak, 2006). Silverman (2010) argues that all senses should be used in order to observe and also interpret the findings and further emphasises the importance of not limiting the research to retelling what the interviewees have told the interviewer, but in fact analyze the data in order to get the scope. There is a paradox of informing the interviewee on the research question of the study, since it may create answers adapted to the research question. However, revealing the research question can make the interviewee receive a better understanding and more positive approach to the research (Silverman, 2010).

In the data collection phase of this study, semi structured qualitative interviews have been carried out with representatives from following four categories: health and care administrations in the selected municipalities, representatives from municipal housing companies, external actors, and a project development company, as seen in Figure 2.2.

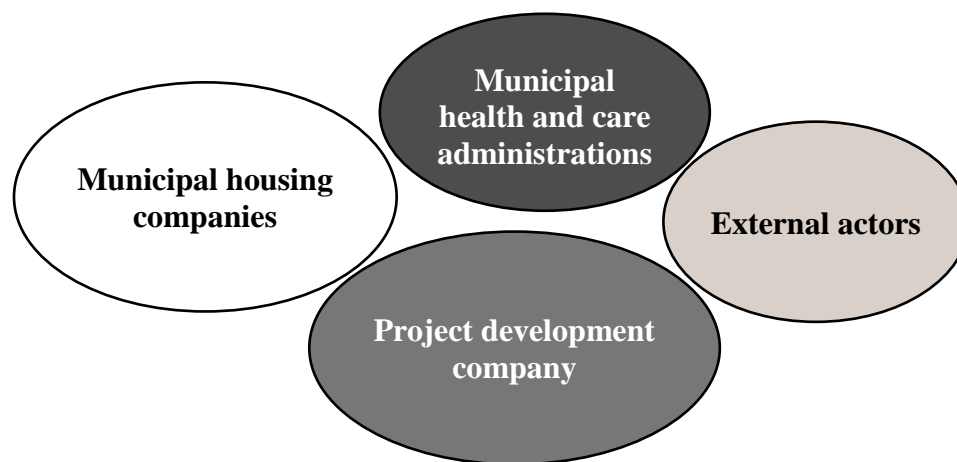


Figure 2.2 The areas represent the four interview categories.

The interviewees in the different organizations were chosen based on involvement and influence in the issue of assisted living. The interviews were carried out with the aim to receive knowledge and insight in the senior housing market situation, and find out what demands and requirements there are from different actors within the geographically chosen area. The interviews within a project development company aimed to gain information and understanding of the company's prospect to generate a concept of assisted living.

The interviews were semi structured and conducted during the spring 2011. Semi structured interviews were chosen due to the space given for individuals to interpret reality in different ways and not force the interviewee to adapt a certain view of reality, as stated by Merriam (2006). The interviews with municipal health and care administrations focused on action plans and strategy as well as existing and future projects with assisted living in the studied municipalities. All interviews took place at the interviewed person's office and lasted for approximately one hour. A majority of the interviews, except those within the project development company, were tape recorded in order to facilitate the interviewers to retain information after the actual interview. The recorded interviews were transcribed short after the interview by the two interviewers separately and later compared during the analysis of the interviews.

A few interviews were not recorded because of personal disinclination from the interviewee.

In the municipal housing companies, representatives for the companies' different projects directed to seniors were interviewed. As for the municipal health and care administrations, these interviews were semi structured and recorded.

There have been four group interviews conducted in this study, with 2-3 persons in each interview. To have group interviews was a choice of the interviewees at the particular municipal or municipal housing company, as a more holistic view of the organisation could be obtained. From a research perspective, advantages of group interviews include the different views that are gained from several people compared to individual interviews (Gaskell, 2000). Group interviews is preferred when the topic concern issues of public interest or common concern, or when the objective is to explore the range of attitudes, opinions and behaviour. On the contrary, there is a better chance to focus attention on one single person in individual interviews. Moreover, some researcher recommends having both individual and group interviews within the same study (Gaskell, 2000). As a result, group interviews were seen as a complement to the individual interviews performed during the study.

In the category of external actors, a concept living consultant, an officer at the county administration board, and a university researcher was interviewed. These actors were chosen as their work in connection to assisted living is from a different perspective than the municipal representatives as well as a project development company.

The interviews within the project development company were conducted in the business's offices in Göteborg and Stockholm, with employees involved in project or business development in the area of housing facilities. The interviewees were selected based on their experience and knowledge, as well as involvement in the topic of the study.

For a complete list of interviewees in the study, see appendix 1.

2.2.2 Analysis

Reflection is part of the analysis of the interviews. Reflection arises when an observable fact is seen from different viewpoints or from same view but in different appearance. In terms of reflective method, the matter of questioning the basis of interpretations and understandings that are perceived as obvious is essential for the research (Thomsson, 2002).

All conducted interviews were followed by discussion and reflection by the interviewers. Simultaneously as information has been collected, interviews have been analyzed and compared. A thematic analysis has been carried out for the interviews with health and care representatives from the studied municipalities. The interviews were grouped into six categories to facilitate the comparison of the outcome. The categories were chosen based on significance to the research questions. The six categories comprise; financing, criteria for assisted living, mapping of current senior housing stock, action plans and strategies, collaboration, and finally future projects. This analysis was carried out to distinguish similarities and variation in the different municipalities.

3 Frame of Reference

In this chapter, the frame of reference used to validate and analyze the findings is presented. The theory of SWOT analysis including examination of internal resources and external factors, followed by a section regarding strategic direction is presented.

3.1 SWOT Analysis

When evaluating a company's opportunities to develop a business idea, both internal and external factors must be taken into consideration.

The external factors and internal resources have been described above, but it is also of importance to connect the two before developing a strategy. Furthermore it is important to consider some fundamental issues about the organization and the industry. To identify and analyze the business environment with focus on strengths, weaknesses, opportunities and threats of the business, is called a SWOT-analysis; see Figure 3.1 for graphical layout (Thompson et al., 2010). The aim of such an analysis is to see how well the business can deal with the changing business environment compared to its competitors. Strengths and weaknesses focus on the internal strategic capabilities of the business, while opportunities and threats focus on the external factors that may have impact on the business (Johnson, 2008). According to Johnson (2008) the analysis is only useful when used comparatively in relations to its competitors and one should be aware of the risk of over generalizing as well as listing too many factors without considering to what extent they may impact.



Figure 3.1 SWOT analysis. Adapted from Johnson (2008).

3.1.1 Analyzing Internal Resources

Analysing the internal resources provides indication on how the company is positioned against rivals on the market, according to Thompson et al. (2010). Internal resources focus on the business and the company capabilities, and are of great importance for reaching success. Strengths and weaknesses are factors that give an organization specific advantages or disadvantages against competitors in its market. Strengths may be valuable skills, competencies or capabilities, valuable physical assets, organizational assets or alliances with partners.

Resource weaknesses are important to identify and consider since these may distinguish vulnerabilities in the company that needs to be improved. Resource weaknesses include poor skills, lack of important physical, organizational, or intangible assets, or missing capabilities in key areas (Thompson et al, 2010).

The resource analysis must be market oriented and customer focused. Regarding weaknesses, customers often perceive weaknesses that a company cannot see. Moreover, strengths are only meaningful if they improve the company's ability to meet customer needs, and therefore only these strengths can be considered true core competences. However, non-market oriented strengths and weaknesses should also be examined (Scott & Marks, 1968).

Because of the increasing complexity in markets and rapid globalization, few companies have all resources needed to effectively compete in its business environment, thus strategic alliances are useful and is gradually becoming more common. Strategic alliances are cooperation between two or more firms with the aim to improve their competitive position and performance by sharing resources, for instance knowledge (Johnson, 2008). According to Ireland et al. (2002), a company in alliance with other can become more flexible thanks to the additional resources available, such as competences and technology. Strategic alliances have potential to enhance a company's performance; however there is a big challenge in managing them and many alliances has ended up in failure. Reasons for failure might be; goal divergence, partner opportunism or cultural differences, and may lead to significant losses (Ireland et al, 2002).

3.1.2 Analyzing External Factors

During the last decades, focus in organizational theory has been shifted from internal processes to the environment interface. The basic assumption is that the environment cannot be controlled, but that a company rather has to take advantage of opportunities and adapt to the environment (Håkansson, 2006). For this reason, the external environment must be observed, analyzed and understood when developing a business strategy or entering a new market. Analyzing external factors in a market analysis, is part of an overall feasibility study. Location, quality, design, price, and market strategy must be identified to be able to develop a project that meets the needs of the market (Schmitz & Brett, 2001).

Dominant Economic Features and Market Analysis

Characterizing factors for one industry may be completely different in another. Therefore it is important to define the dominant economic features such as; market size and growth rate, number of potential buyers and sellers, geographic scope, and product differentiation. In determining the economic features of the industry,

knowledge and understanding is gained for the strategies performed in the market section (Thompson et al, 2010).

Market segmentation is the process of identifying and analysing submarkets of a larger group of property markets, which is included in the market analysis. The segmentation can e.g. be related to price, size or location. In the construction industry, supply and demand are location specific. The geographical region where the majority of the demand comes from and where the majority of competitors are located is called “market area” (Schmitz & Brett, 2001)

Market analysis is the identification of demand and supply of a specific product, which is a crucial part for competitive successful projects. Supply represents what current or expected competitors possess in the expected market (Schmitz & Brett, 2001).

As part of the market analysis, projecting the demand is a key factor to reach success, but on the other hand it is difficult and requires research, experience and intuition. Demand analysis should consider population, demographic characteristics, income, affordability, as well as employment, migration and commuting patterns (Schmitz & Brett, 2001). When projecting demand for seniors, according to Clark, (2005), the decreased willingness to move compared to younger generations of the population, should be taken into consideration.

Porter’s Five Forces Framework

A tool used to analyse the competitive forces of the market is Porter’s Five Forces Framework, in which the competitive forces impacting the market and the business is studied. The five forces are, as seen in Figure 3.2; entry of new competitors, threat of substitutes, bargaining power of buyers, bargaining power of suppliers, and rivalry among existing competitors (Porter, 1985). A company must understand how these forces work in its industry and how they affect the company’s situation when developing a strategy. As stated by Porter:

“Awareness of these forces can help a company stake out a position in its industry that is less vulnerable to attack” (Porter, 1985, p. 102).

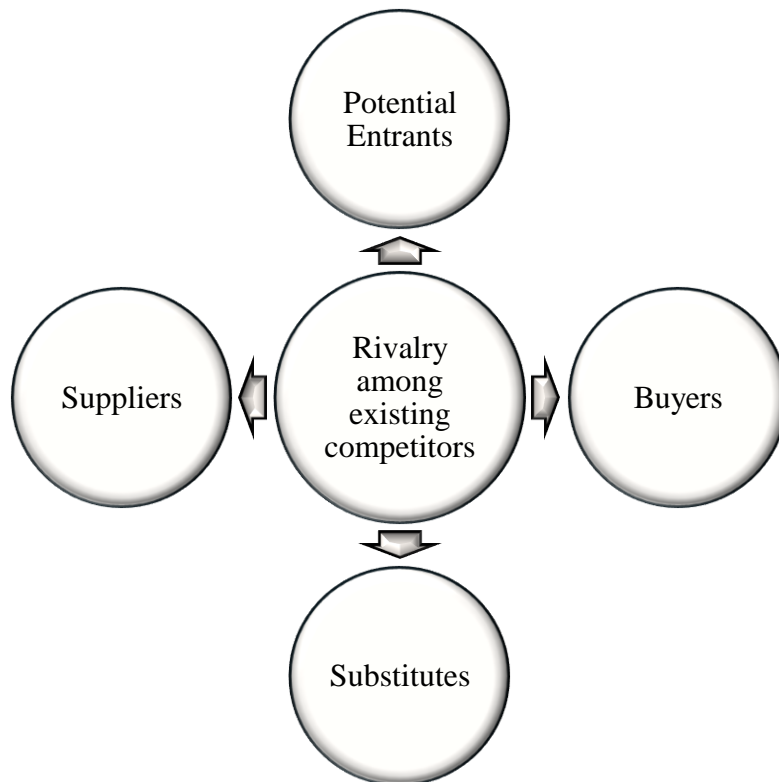


Figure 3.2 Porter's Five Forces Framework to identify the competitive forces of the business and market. Adapted from Johnson (2008).

The combined strength of these forces determines the ability for a company to succeed in its business environment (Porter, 1985).

According to Johnson (2008), competitive advantage cannot only be achieved through competition but also by collaboration. Collaboration can be viewed through Porter's Five Forces Framework, where collaboration with suppliers, competitors and customers can achieve increased results in buying power, selling power, gaining entry and competitive power, as well as sharing work with customers (Johnson, 2008).

PESTEL-Analysis of the Macro Environment

Key drivers of change are essential environmental factors that impact the outcome of a strategy. A PESTEL-analysis where Political, Economical, Social, Technological, Environmental, and Legal aspects are considered can be used to map the macro-environment, see Figure 3.3 (Johnson, 2008). These elements have close relationships and impact on the others, for instance political and legal are often depending on each other (David & Craig, 2005). David & Craig (2005) further states, that political aspects include analysing the stability of the government and require knowledge of how the company will be affected by governmental actions. Governmental actions can in fact both favour and disfavour the company. Economical factors concern macro-economic factors e.g. interest rates (Johnson, 2008). Examples of sociological key drivers are demographics, social values and norms. As regards technology, organisations that wish to stay competitive must be qualified to adapt to innovations and new technology in all their activities (David & Craig, 2005). Environmental aspects represent "green" issues such as pollution and waste, and finally, legal refers to legislative restrictions related to issues of for instance health and safety (Johnson, 2008).

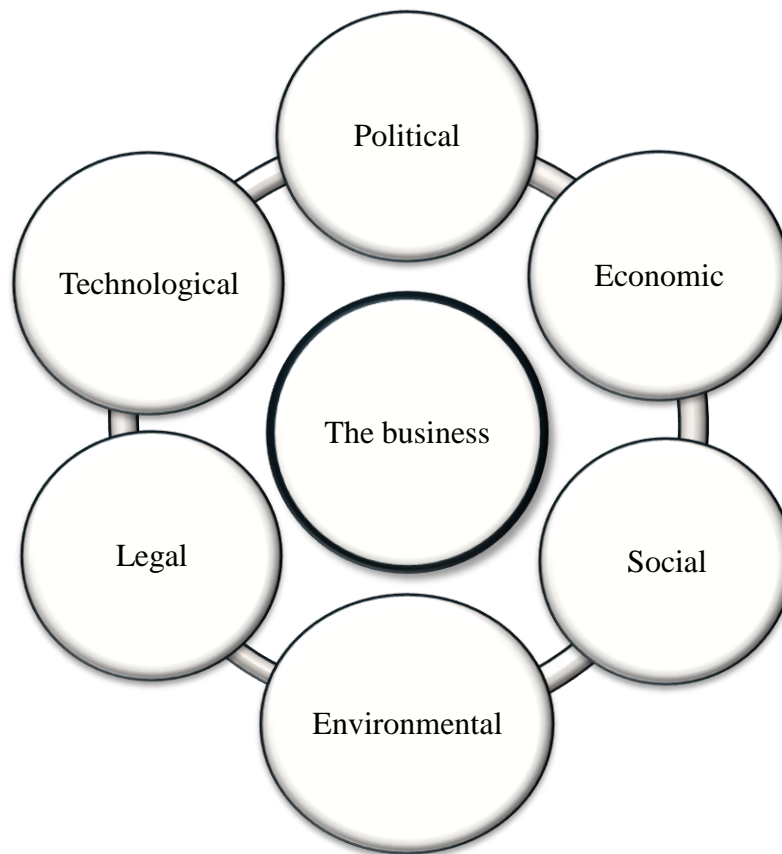


Figure 3.3 The PESTEL-analysis of the macro environment to identify the factors affecting the context of assisted living. Adapted from Johnson (2008).

3.2 Strategic Direction

For a company to grow it should be innovative and focus on factors such as redefining market or development of products or services (Pleshko & Heiens, 2008). When a business idea is generated it is important to map the target group and position the idea in the right area of the market. According to Szatek (2008), this can be done through segmentation, and positioning analyses, including identifying needs, study the customer group and identifying the vital interest of the group. Szatek (2008) further presents that a clear description of the offer is necessary, but for assisted living van Bilsen et al. (2008) argues that there is not a unanimous explanation of the term assisted living, or sheltered housing as they have chosen to call the type of housing.

Understanding the market is essential to generate good ideas, but there is always a risk when entering a new market. To limit this risk, a developer should pay extra attention in assessing its position in the marketplace and be realistic when setting goals and objectives. Market analysis guides decision makers regarding location, size, quality, features etc. in both private and public real estate development (Schmitz & Brett, 2001).

Igor Ansoff, presented the product-market growth matrix, which combines current and new market with current and new products (Pleshko & Heiens, 2008). According to his theory, a company should choose one of the four product-market growth strategies, featured in Figure 3.4. The strategic direction is closely connected to the choice of strategy since it is important that they correlate.

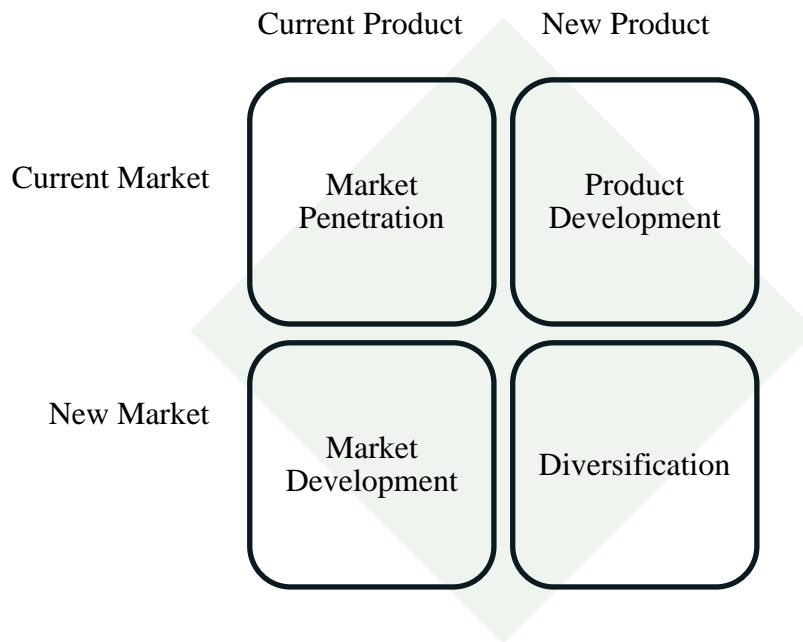


Figure 2.4 The product-market growth matrix created by Ansoff. Adapted from Johnson (2008).

In the market penetration, current products are refined and more market shares are gained in the current market. Market penetration is seen as the safest growth option since the company seeks to keep existing customers and attract new customers in already existing market. Market development, where companies introduce existing products into new markets, trying to attract new customers, in for instance a new geographical area, has a fairly higher risk. Product development corresponds to companies that develop new products on already existing market. The product development may exemplify completely new products, different versions, or different quality of current products. Diversification is seen as the most risky strategy where companies introduce new products into new markets. (Pleshko & Heiens, 2008)

The presented theory concerning SWOT analysis and strategic direction will be used to discuss and analyze the findings, in relation to the research questions.

4 Market Characteristics and Dominant Features

This chapter presents results responding to the first research question:

What are the conditions of the current market of assisted living and what factors affect the development of the market?

Initially, statistics and demographic forecasts are presented, followed by the governmental process and decisions regarding assisted living. After that, the existing housing market for seniors in Göteborgsregionen is presented.

Two important dominant economic features of the assisted living industry are market size and growth rate. As stated by Ahlström and Nilsson (2007), the number of end users is likely to experience a major increase due to the large number of births in the 1940s, which require well adapted housing for seniors.

In the market area, where the study has been carried out, the following age structure is found, see Figure 4.1.

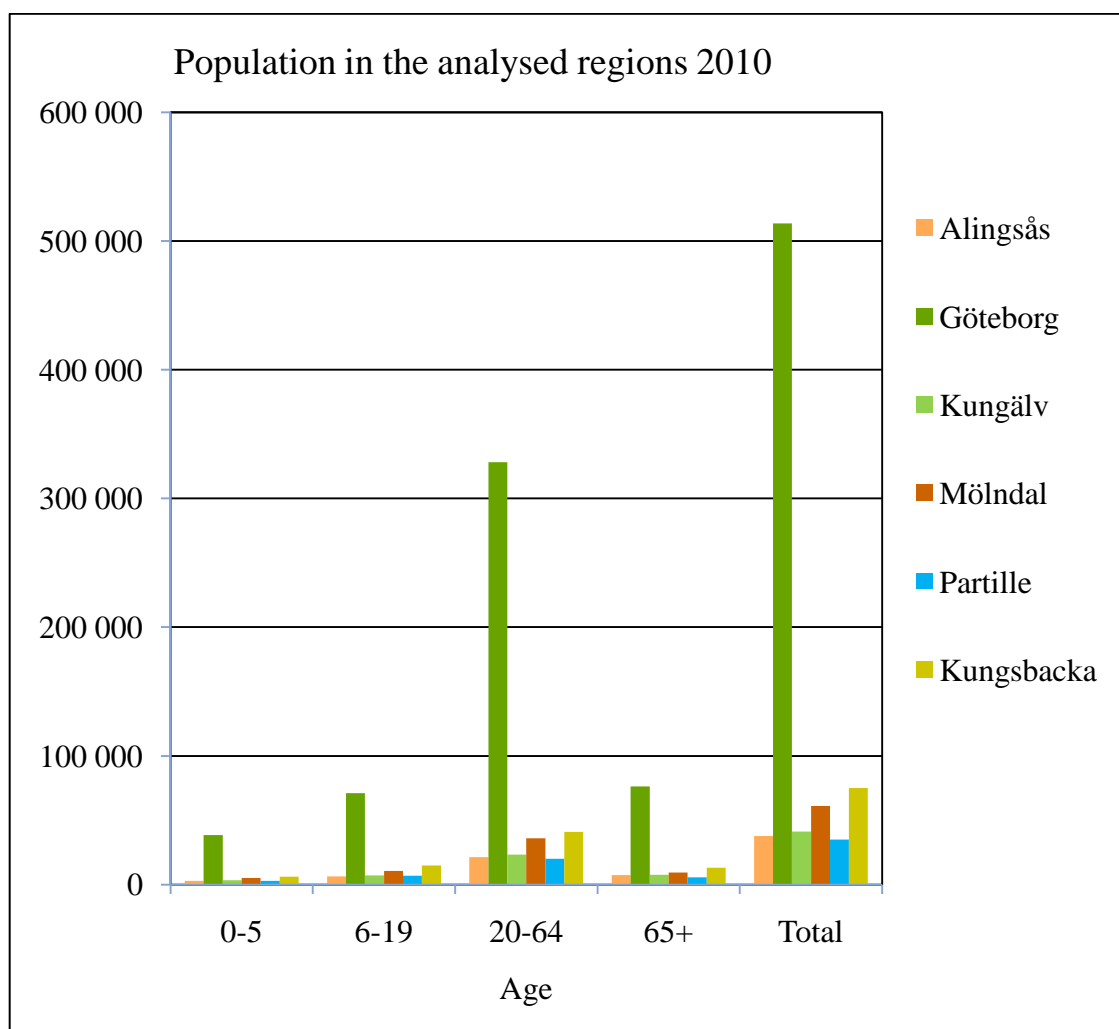


Figure 4.1 The population structure in the studied areas of Alingsås, Göteborg, Kungälv, Mölndal, Partille and Kungsbacka (Statistiska centralbyrån, 2010).

Göteborg is by far the largest municipality, with a population of 513 751 at the end of 2010. In Table 4.1, the percentage of seniors in the specific municipalities is presented in relations to the total population as of 2010.

In Table 4.2 the expected population in 2020 is presented. The total age span of 65+ in the analyzed municipalities is expected to increase from 15,6 percent as of 2010 to 16.7 percent in 2020. This correspond to a growth of approximately 21 800 people of the age above 65.

Table 4.1 The table features the population of people above the age of 65 in the analyzed municipalities 2010 (Statistiska centralbyrån, 2010).

Senior population in relation to region, 2010			
	65+	%	Total
Alingsås	7394	19.6	37796
Göteborg	76214	14.8	513751
Kungälv	7652	18.6	41241
Mölndal	9296	15.2	60973
Partille	5520	15.7	35084
Kungsbacka	13021	17.3	75025
Total	119097	15.6	763870

Table 4.2 Table featuring the predicted population of people above the age of 65 in the analysed municipalities 2020 (Statistiska centralbyrån, 2010).

Senior population in relation to region, 2020			
	65+	%	Total
Alingsås	9476	22.4	42 265
Göteborg	88141	15.6	563 086
Kungälv	9574	20.0	47 840
Mölndal	10822	15.9	68 091
Partille	6415	16.4	39 094
Kungsbacka	16471	20.5	80 176
Total	140899	16.7	840 552

On average in Sweden, the costs for nursing homes amounted to 557 700 SEK per person in 2007, which represents an increase of 4.7 percent since 2004 (Socialstyrelsen, 2009a). Moreover, the total costs for care of senior citizens represent 54 percent of the costs of social service in Sweden (Socialstyrelsen, 2009a).

In Göteborgsregionen, the costs for care of senior citizens amounted to 8 billion SEK in 2009. The main source of expenses is nursing homes used for 8000 people, which represent 4.2 billion SEK per year (GR, 2010).

According to several of the interviewed health and care representatives, the tendency of nursing homes is that municipalities are decreasing the amount of beds due to the high cost, and instead try to care for seniors for as long as possible in their own homes. Hence, strategies to meet needs for health and care of the aged population with other means than nursing home must be improved according to The National Board of Health and Welfare (2009a).

On the contrary, home service has grown equally. Seniors with disabilities staying in ordinary homes are dependent on care and other services, which require coordination from authorities. The cost per user of home service is about 120 000 SEK per year, and the total cost in Göteborgsregionen amount to 3 billion SEK per year (GR, 2010).

4.1 Governmental Process and Decisions

In recent years, the housing situation for seniors has been evaluated on a governmental level. The Swedish government appointed a delegation in 2006 to investigate and analyze the development and needs for housing directed to the increasingly aging population, see Figure 4.2. The delegation presented the report “Bo för att leva Seniorbostäder & Trygghetsbostäder”, which serve as basis for further discussions on housing for seniors (SOU 2008:113). In 2008, the delegation presented “Bo bra hela livet” where recommendations for the situation regarding housing for seniors were suggested. The delegation argues that today’s housing stock is not sufficient to meet the need for adjusted living for seniors, thus, interventions must be taken (SOU 2008:113). In this report the concept of assisted living was presented.

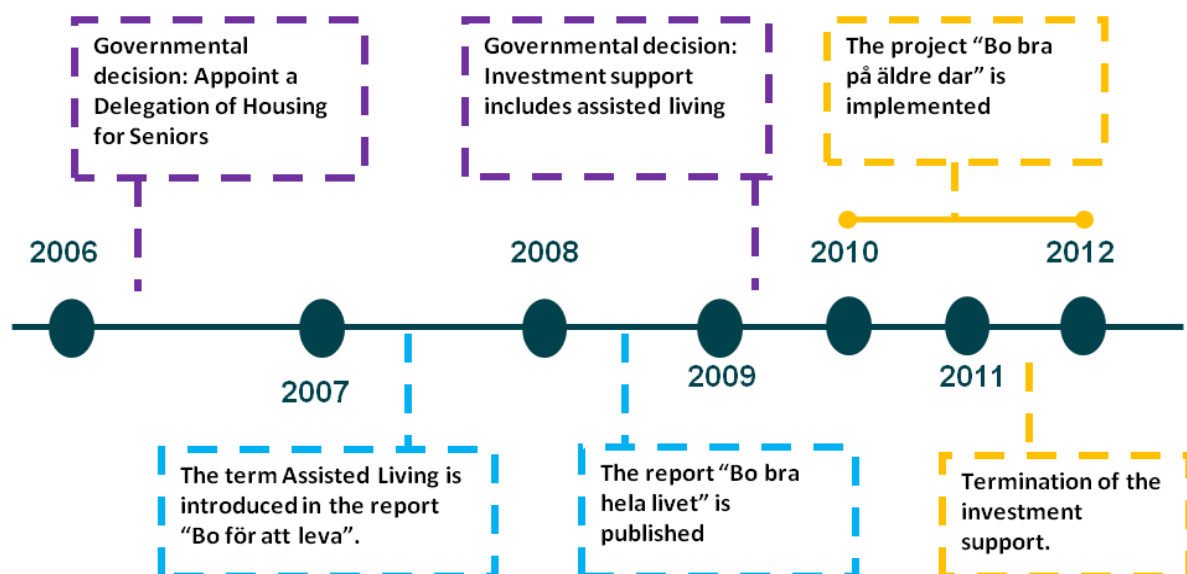


Figure 4.2 Timeline for the governmental process connected to assisted living.

A proposal from the Delegation of Housing for Seniors, contributed to the establishment of an investment support from the Government in 2007 for developing nursing homes. The government revised this support in 2009 to also apply for assisted living (Boverket, 2010). The support is valid from 1st of January 2010 until 31st of December 2011. Requirement for the support is that the project must be initiated between 1st of October 2009 and 31st of December 2011, and finished no later than two years after inception. The investment support is granted for new buildings and refurbishments as well as rental apartments, cooperative rental apartments and condominiums (Boverket, 2010).

For new buildings, 2 600 SEK per square meter can be granted, and for refurbishment, 2 200 SEK per square meter. If the apartment is intended for one person, the investment support is eligible for 50 square meters, where 15 square meters is set for the common areas. If the apartment is intended for two persons, 70 square meters are valid for investment support, where 20 square meters can be used for common areas (Boverket, 2010).

The delegation has suggested that the investment support for assisted living should be extended until at least 2014 (SOU 2008:113). However, the investment support is decided by the Government, and there has been no indication for a prolongation of the investment support as of April 2011, according to a special adviser at The Swedish National Board of Housing, Building and Planning.

To further stimulate the development of housing for seniors, the government initiated the program “Bo bra på äldre dar“ in 2010, which lasts until the end of 2011. The program is managed by The Swedish Institute of Assistive Technology and has reserved 50 MSEK to support projects like feasibility studies, and architect competitions in collaboration with municipalities in the area of housing for seniors (Socialdepartementet, 2010).

4.2 Existing Housing Market for Seniors

In order to understand from what market assisted living has developed and in which context the concept will operate, the current market for senior housing has been explored and analyzed. The existing concepts, and options, of housing for seniors in the analyzed municipalities are mapped and exemplified in this section.

There are various concepts of housing adapted to seniors, which can range from gated communities to collaborative housing, as well as senior housing. These categories of housing are a part of the ordinary housing market, but with a certain focus. The means tested housing options, sheltered housing or nursing homes, is on the other hand only eligible for persons above the age of 65 and in need for 24 hour assistance (Göteborgs Stad, 2010). The different housing options with existing concepts, which will be further explained in the text below, are shown in Figure 4.3.

Until recently there was no alternative to senior housing, concept living, means tested sheltered housing and nursing homes. Assisted living is situated in the gap between these options, and is part of the ordinary housing market. However, assisted living offers much of the service and comfort as sheltered housing or nursing homes offer.

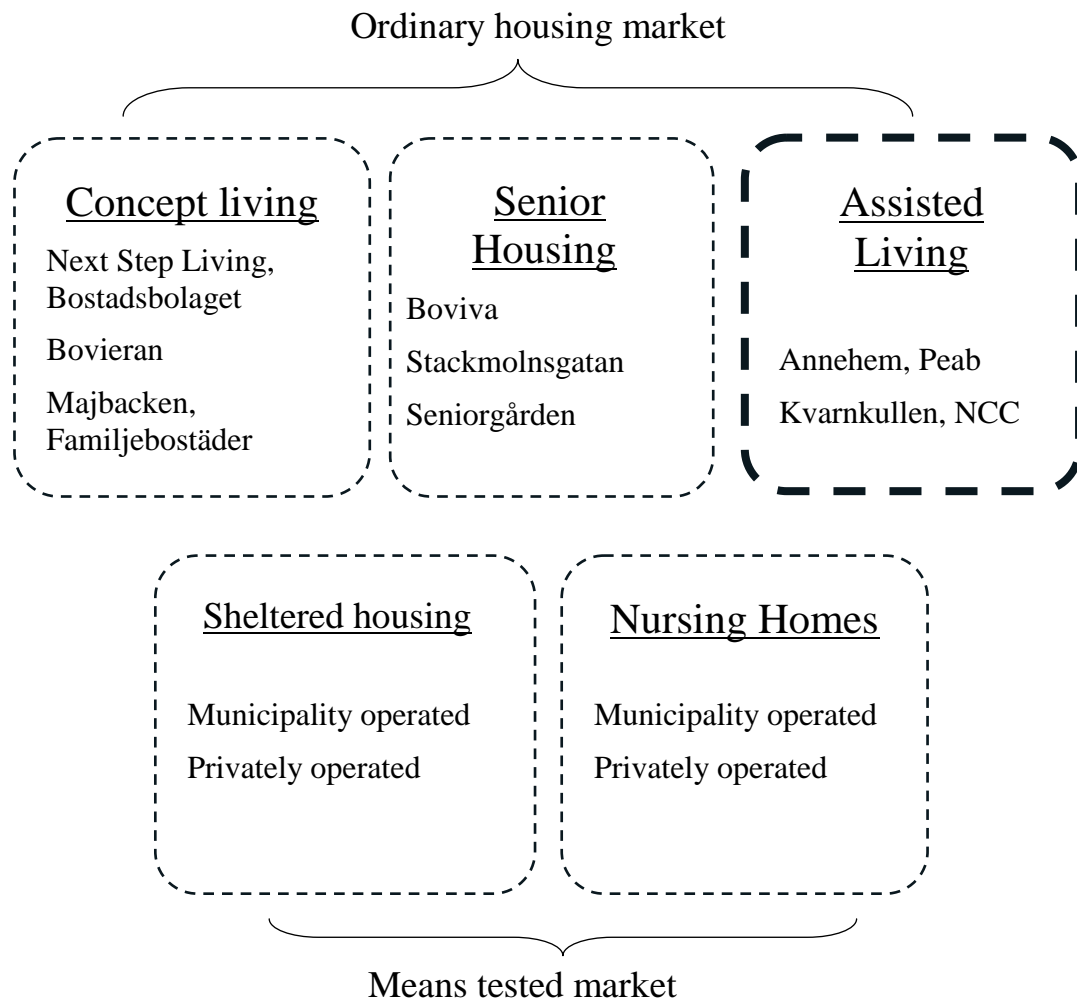


Figure 4.3 The different housing categorizes on the market today, and examples of existing housing options for seniors in the analyzed area.

4.2.1 Concept Living

Concept living is a form of housing, which is usually based on a certain idea or lifestyle. This often includes wellbeing and social activities where the tenants or owners together finance a number of common facilities (Boverket, 2008). In the following paragraphs, the concept livings in Göteborgsregionen are presented.

Next Step Living

Next Step Living is a concept living which offer rented apartments together with common areas to stimulate social gathering and activities. In addition, there is service personal available for the tenants. Majviken, located in Göteborg city, was opened in September 2010, and is the first Next Step Living house in Sweden. The concept is designed to be implemented both in existing and new housing. Next Step Living has no age limit but rather strive for various ages. The concept of Next Step Living is developed by the municipal Housing Company Aostadsbolaget in cooperation with the company Next Step Group (Next Step Group, 2010). The additional cost related to the housing is mainly shared by the tenants, who pay a fee to access the common areas and activities.

Majbacken

Majbacken is a collaborative housing with the aim to improve a social life of tenants. It is located in the west of Göteborg and consists of 31 apartments. The target group is adults and seniors, but the objective is to contain a wide range of ages. The only requirement of tenants is that there are no children staying at home. All apartments are rentals, which the resident's association leases on a long term agreement from the municipal Housing Company Bamiljebostäder. There is no specific queue for these apartments, but the association has the right to decide who should be offered an apartment (Majbacken bogemenskap, 2011).

Bovieran

The housing concept Bovieran consists of 48 condominiums in Partille outside of Göteborg. The housing complex consists of three residential houses connected with an all-year around garden where most of the socializing is concentrated. Bovieran is designed to improve social life of the owners by providing common areas, and in addition, room for exercising. Today Bovieran only exist in Partille, but there are plans for further production in several cities in Sweden (Bovieran, 2009). The initiative to Bovieran was taken by the private company Bovieran AB. The target group is people in the later part of life, but no official age limits has been decided upon (Bovieran, 2009).

BIG

The collaborative housing association Bo i Gemenskap (BIG) has no requirement regarding age limit. The house, initiated by the association, was built in 2006, and consists of 44 apartments. It is established as a cooperative tenancy, which the association leases on a long term agreement from the municipal Housing Company Dölnalsbostäder. The concept enhances a community based on common areas, and the possibility to eat in company of others in a dining room. The house also contains a library, sauna, and exercise room (Mölnalsbostäder, 2011).

4.2.2 Senior Housing 55+

Senior housing for people above the age of 55 mainly focuses on making the living easier as people age. The focus is mostly on the convenience of living in a newly built house, which often offer extra services such as cleaning, ordering food and other housing services. In the senior housing segment for people above the age of 55, three concepts have been identified in the area of Göteborg.

Boviva

The housing concept Boviva comprises rental apartments run by the SEB Tryggliv foundation. The housing includes accessible apartments with a hostess service and common facilities. The hostess provides the tenants with services such as taxi bookings, cleaning, or other general help in the apartments (SEB, 2011). The extra services and common facilities are charged for in a monthly fee to the property owner.

Stackmolngatan

Stackmolngatan is a pilot project by the municipal Housing Company Coseidon in collaboration with the municipal project Senior Göteborg. The starting point for Stackmolngatan was an ordinary rental house, with a majority of senior tenants, which has been adapted and somewhat refurbished with focus on the ageing tenants (Bostads AB Poseidon, 2011). So far, the project has been successful, according to

both Senior Göteborg's representative, and the project manager at the housing company. However, the pilot project is financed by a project budget. For further development of the concept, a more sustainable economic solution has to be found according to the project manager.

Seniorgården

Another senior housing concept is Seniorgården, which is a part of the JM-group. These condominiums, directed to people above the age of 55, provide the owners with highly accessible apartments, and common areas in the houses. Seniorgården has operated the market for 15 years, and is a national concept, offered in several different areas in Sweden (Seniorgården, 2008).

4.2.3 Assisted living 70+

Assisted living have high accessibility standard, and is developed in order for the users to be able to age in the specific apartment and continue living as independently as possible. Focus is given to common areas to enhance social meetings, and a service person is available at certain hours of the day to assist the tenants (Boverket, 2010). To qualify for this kind of housing, one of the persons living in the housing has to be above the age of 70. There have been some attempts to convert previous sheltered housing to assisted living. However, since these are not in accordance with the definition of assisted living, the converted sheltered housings are not described in this section.

Annehem

The only concept, which is purely defined as assisted living in Göteborgsregionen, is Annehem, developed by Peab. The intention is to provide the municipalities with a concept offering four different financing options (Peab, 2010). The house can either be used as rentals or condominiums. Common areas, as well as the service operator, can be charged by the owner, or rented to the municipality (Peab, 2010).

4.2.4 Sheltered housing

The sheltered housing stock was developed in Sweden in the 1970's. The purpose was to provide seniors, with some need for service and care, with a sheltered accommodation (Schön & Wånell, 2005). These houses offer smaller apartments, and are often located in connection to nursing homes.

The sheltered housing was not intended to be a part of long-term care and nursing homes, but due to Ädelreformen in 1992, and the strained budget of the municipalities in the 1990's, this was very much the outcome (SABO, 2007). To be able to move in to sheltered housing, a decision by the municipality has to be made, thus it is means tested. As the tenants in the sheltered housing aged simultaneously, the need for care increased dramatically. The facilities were however not designed to meet the demand from the aging tenants, as well as the nurses working there. Some of the sheltered housing was reclassified as nursing homes, without really fulfilling the requirements in work environment.

Today many of the sheltered housings have been converted to assisted living or student housing to better fulfill the purpose (Schön & Wånell, 2005). In the area of Göteborg, some municipalities still uses sheltered housing, but as the report by SABO (2007) presents, the municipalities mainly has the responsibility to provide nursing homes and therefore sheltered housings are altered or closed.

4.2.5 Nursing Home

In the Social Service Act, it is stated that the municipality is obliged to provide its citizens with the support and assistance they need to live a dignified life (SFS 2001:453). When the need of assistance and care is great for a person above the age of 65, the person may qualify for a nursing home (SFS 2001:453). To be granted a bed in nursing home, a decision has to be made by the municipality, thus making nursing homes means tested. Qualifications and requirements is however, significantly higher today than in the 1980's and 1990's (SABO, 2007). The trend for nursing homes is that people today move in when they are sicker, and stay there only for a short period of time, often less than two years (SABO, 2007). There are a number of nursing homes in Göteborgsregionen, operated both by the municipality, and private companies.

From mapping the current market of housing alternatives for seniors, it can be concluded that there is currently several options of concept living and senior housing in Göteborgsregionen. However, there is only one concept that has been identified as assisted living according to the definition.

5 Market Situation in the Analyzed Municipalities

This chapter presents the empirical case study and responds to the second research question:

What requirements do the municipalities have for assisted living?

The following findings are based on public reports, provided by the municipalities, and interviews with representatives from health and care administrations, as well as municipal housing companies.

The interviewed representatives from the municipal health and care administrations share some common views of assisted living, and how to provide the ageing population with appropriate homes. All studied municipalities share the attitude that seniors should be able to stay in the homes as long as possible, and be offered help and support to live as independently as possible. The policy is referred to as “the policy of staying longer at home”. To provide the opportunity for people to age in their own home, accessibility in the ordinary housing stock is essential, and something that most municipalities are currently working with. In order to improve the existing housing, a majority of the municipalities, and all of the housing companies, has made an inventory of the existing stock of apartments, and mapped the accessibility of these.

Moreover, all studied municipalities, except for Göteborg, have implemented LOV; see Table 1 *List of Terms*. The law enables citizens to choose home service offered by the municipality or by a private operator.

It has been noticed that few of the interviewed representatives from health and care administrations are clear about what assisted living actually means, and it is also uncertain to what extent the municipality should or can be involved. The municipal representatives have a great interest in developing assisted living, but argue that the municipality should not be seen either as a possible client, nor a long-term tenant of the facility, as has been used successfully when building nursing homes. Some of the municipalities see themselves contributing by financing common areas, and perhaps a service person, in order to relieve the rents for the tenants. However, it has been noticed during interviews with representatives from the health and care administration, that it is still unclear to what extent the municipalities are responsible for assisted living, and if they should give any financial support.

The majority of the studied municipalities are currently discussing the municipal involvement in assisted living. The general opinion indicates that the public sector wishes the ordinary housing market to provide assisted living. Nevertheless, the societal gains in building assisted living are many. The municipalities’ budgets are already strained, and the growing part of the senior population will further stretch the budget. Therefore, alternative solutions need to be found in order to provide the future seniors with sufficient care. Moreover, the policy of staying longer at home decreases the costs for nursing homes, since seniors are cared for in their homes. Though the costs for home service will at the same time increase, but in total, the municipal budget will be relieved. As the Delegation of Housing for Seniors also states:

” The opinion of the delegation of Housing for Seniors is that expanding the supply of assisted living, even though the cost for home service might increase, will decrease the cost for seniors care in nursing homes “. – The delegation of Housing for Seniors

All studied municipalities experience an increasing senior population, and based on the population forecast, a majority of the interviewees see a demand for this type of housing. However, existing assisted living in Alingsås and Partille had many applicants in interest surveys, but when it came to actually moving in, few were ready to make the move, resulting in barely enough tenants to fill the apartments. Health and care administrations tend to base the demand purely on demographic forecasts of the growing senior population. Moving out of the own home in a later stage of life poses more difficult than it appears, which makes the actual demand hard to predict.

Contrary to the interviewed municipal representatives, interviewees from a municipal housing company do not see as a large demand and question the information on which the demand is based. They expressed that the demographic forecast only predicts a raising amount of senior, but does not take into account the willingness to move, or what kind of housing the seniors already live in today. For assisted living one of the housing companies will conduct further survey to monitor the actual demand, before proceeding with an assisted living project together with the municipality of Göteborg. The housing company is mostly worried about the situation arising if being granted investment support, which only entitles tenants above the age of 70, and then not being able to fill the house with the intended target group. The housing developer at Housing Company B further states that due to scarcity of housing in Göteborg, it is contradictive to exclude a large group of people from renting apartments. The housing company has made an inventory of their own stock and has found that seniors are overrepresented in their accessibly apartments, and therefore the challenge is to match seniors with suitable apartments and refurbishing the existing stock.

Representatives from the interviewed municipal housing companies share a view that differs from the municipal representatives. The housing companies are more focused on the end customer of assisted living and if assisted living is suitable for their existing, and potential tenants. They do not consider the issue of assisted living being a complement to seniors moving to nursing homes. Municipalities have another, more holistic view of the situation, where the general care of seniors is the priority and housing options are a part in the general approach.

The issue of whether or not to gather and group a category of people has been discussed during the interviews with municipality representatives, and representatives from the municipal housing companies. All emphasized that assisted living should not be seen as an institution, but as a part of the ordinary housing market. The basic idea for housing politics, and also the policy of the housing companies, is to have a mix of tenants in the different houses. This is why a part of the interviewed persons were hesitant towards the idea of building apartments only intended for people above the age of 70. On the contrary, living with people in the same stage of life might present opportunities for social meetings. As stated by a representative for the board of SABO¹:

“Loneliness and social isolation is a much bigger problem than illness for today’s seniors”. – Board member of SABO

Moreover, the interviewees from health and care administrations mentioned a seesaw effect where tenants move into an assisted living healthy and independent at the age of 70. Later on, most tenants become ill and less independent at a similar time, thus shifting the atmosphere in the housing and making it unattractive for “young” and

¹ SABO, the Swedish Association of Public Housing Companies.

healthy seniors. The challenge, as explained, will be to find a balance of tenants and to be able to attract younger seniors to move in with the older.

There have been discussions in all studied municipalities about the criteria for assisted living, see Table 5.1, where age limit being a key issue. Some interviewees questioned if an age limit is necessary at all, and argue that age does not necessarily equal need.

Table 5.1 The table features criteria for assisted living which the specific municipality intend to work from.

Criteria for assisted living	
Göteborg	Intend to follow the criteria according to the Delegation of Housing for Seniors.
Partille	The applicant must be existing resident in Partille, in need of home service, and above 70 years.
Alingsås	Age limit of 65+. Other criteria are closeness to services and social activities, as well as high requirements of accessibility.
Mölndal	Intend to follow the criteria according to the Delegation of Housing for Seniors.
Kungälv	Intend to follow the criteria according to the Delegation of Housing for Seniors.
Kungsbacka	Intend to follow the criteria according to the Delegation of Housing for Seniors. Despite, the applicant must be existing resident in Kungsbacka.

As seen in the table, requirement of home service has been discussed as criteria for assisted living. The reason for this criterion is to ensure that people in greatest need are assigned these apartments. This requirement does however mean that the assisted living is not obliged investment support.

In the next sections, the differences concerning the context of assisted living are presented in each studied municipality, as well as the number of interviews and the interviewee's professional positions.

5.1 Göteborg

Divided in three interviews, six people working for the health and care administration, and housing companies' in Göteborg, have been interviewed. The first interview was carried out with a process manager and a real estate representative from Senior Göteborg, which is the development centre responsible for issues related to seniors in Göteborg (Göteborgs Stad, 2011). The second interview was held with three representatives from the Housing Company B, and the last interview was carried out by telephone with a communications administrator at the Housing Company A.

As shown in Chapter 4, the senior population in Göteborg will increase in the next 15 years. The municipality of Göteborg has considered the ageing population, and have

since 2004 taken several actions to prepare the municipality as well as possible. For instance, the population has been studied both with reference to age structure and moving patterns and the study resulted in the brochure “Befolkningsstruktur och bostadsbeståndet” (2006). The population forecast, and challenges considering housing for seniors in Göteborg is further explained by Klingberg and Hermansson (2010) in the report “Strategier och ramverk för mellanboendeformer för äldre i Göteborgs Stad”.

As a part of improving the situation of housing for seniors, a prospect was made together with Boplats. The prospect presents about 1600 apartments directed to seniors, both rental apartments and condominiums (Senior Göteborg, 2010).

In a survey with senior citizens in Göteborg, it was found that 93 percent of all citizens in Göteborg above the age of 65 live in ordinary housing. However, many of the homes does not provide elevated accessibility, which makes it difficult for seniors to stay in their houses and still have an active and independent life when they are aging (Klingberg & Hermansson, 2010). A questionnaire study from Senior Göteborg also indicates that the demand for senior housing on the ordinary housing market is far greater than the supply (Klingberg & Hermansson, 2010).

Strategy and policy

In the interview with the two representatives from Senior Göteborg, the process manager clearly states that they are positive to a broader market with different housing options for the senior population. The intention of the municipality of Göteborg is to plan or initiate the construction of 300-400 apartments in transitional living by 2012 (Klingberg & Hermansson, 2010). Both refurbishing existing houses and construction new is ought to be done in order to expand the stock. Subsidies for personnel and common areas from the municipality should serve to stimulate this establishment and should be considered for property owners establishing assisted living, since this will likely benefit the municipality in the future (Klingberg & Hermansson, 2010).

To be able to deliver the extensive plans in the statement of the municipal executive committee, Senior Göteborg has formulated four main strategies; see Figure 5.1 (Klingberg & Hermansson, 2010):

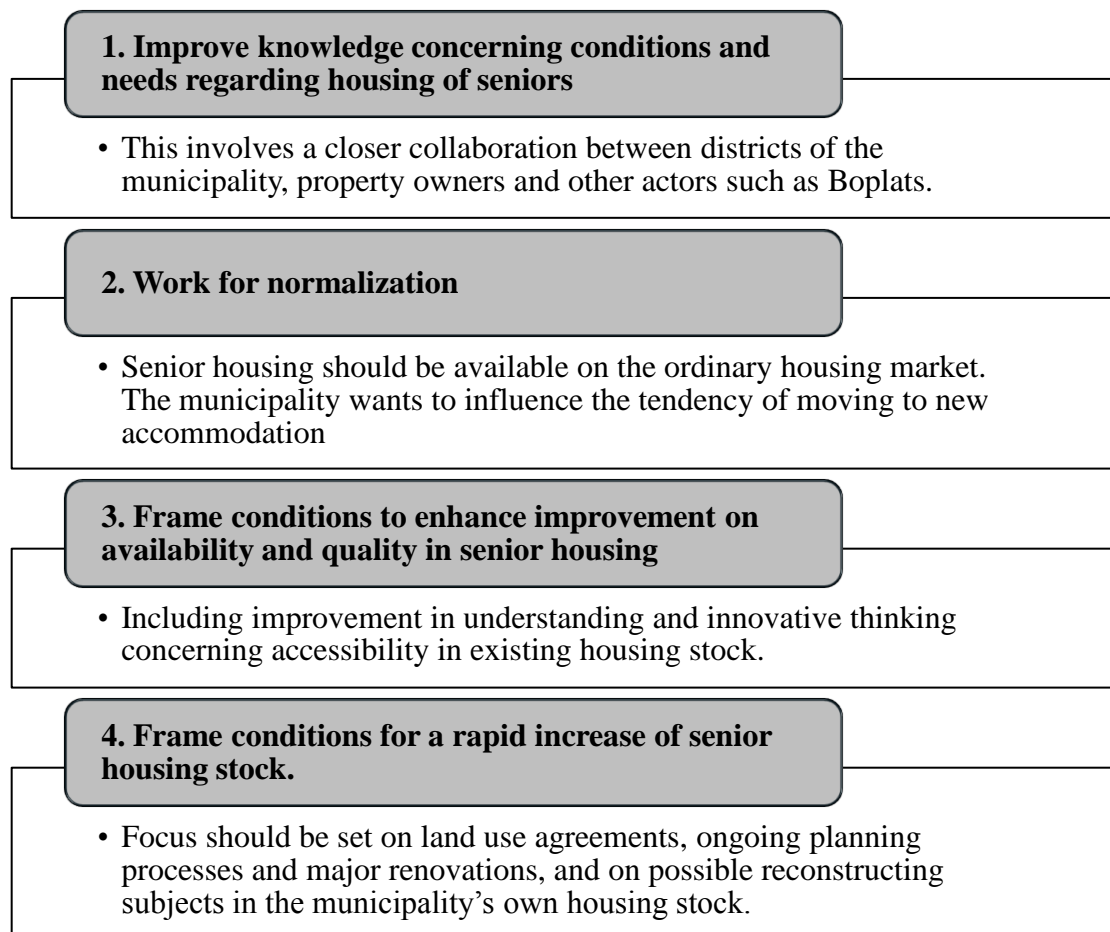


Figure 5.1 The strategies of Senior Göteborg.

Assisted living is a part of the strategy 4 to further expand the senior housing stock in the region (Klingberg & Hermansson, 2010). General guidelines have been established, but these will be improved to more detailed guidelines during the spring of 2011. Furthermore, the real estate representative means that the issue of assisted living is something that the market should take care of, but at the moment the situation can be described as:

“The municipality turn to the market actors for initiatives and the market actors look at the municipality for economic support”. – Real estate representative, Senior Göteborg.

The statement shows the challenge of the market today, where the responsibilities and initiatives are undecided between the actors of the market and the authority of the municipality.

Existing stock of assisted living

There are no purely expressed assisted living houses in Göteborg. However there are a few concept livings similar to assisted living. In Chapter 4, the concepts presented by the municipal housing companies are explained.

Both Housing Company B and Housing Company A received a mission from their public owner, three to four years ago to investigate future senior housing concept.

Both companies came to the conclusion that seniors does not view themselves as seniors and that a concept should not be directed only to seniors but instead to create a housing concept where a common idea is shared by the tenants. For Housing Company A, this resulted in Next Step Living and Housing Company B has work with collaborative living.

Both Housing Company B and B, agree that creating mixed houses is what they strive to form as much as possible. The marketing director at Housing Company B mentions an interesting point of view:

“It may just be better to build well designed houses and apartments with improved accessibility from the beginning for all tenants”. – Marketing director of Housing Company B.

Since Göteborg is a city region with a strained housing market, and the demand for apartments are exceeding the supply tremendously, representatives from Housing Company B are doubtful about investing money reserved for a specific group above the age of 70, when 60 percent of their tenants moving in are 20-30 years of age.

Future projects

The municipality of Göteborg focuses its efforts in housing for seniors through the city office and Senior Göteborg (Klingberg & Hermansson, 2010).

The interviewed representatives from Housing Company B states that the company has plans together with a municipality district in Göteborg and Senior Göteborg to investigate the possibility to build an assisted living house. However, the company doubts that there is an actual demand for this type of apartments. The housing developer at Housing Company B emphasizes that they rather focus on developing their concepts in the area of collaborative housing. The marketing director means that the guidelines for the investment support makes them hesitate about assisted living due to the risk of not being able to find tenants above the age of 70. This is contrary to the opinion of the municipality reports presented by the City office, who has found a large demand for assisted living based on demographic forecast (Klingberg & Hermansson, 2010). Housing Company B plans to make a market analysis focusing on the actual possible tenants of the assisted living, before further concretizing the project.

Housing Company A have plans to expand the concept of Next Step Living and would like to implement it in a newly built house, but the challenge is to find an area with a large number of apartments in order for it to be economically sufficient. The municipality does not see the Next Step Living concept as the economically best option, but argues that it is better to look at the pilot project Stackmolnsgatan, which is described in Chapter 4.2.2. Stackmolnsgatan is evaluated during spring of 2011 and the economical outcome will most likely set the future for similar projects.

5.2 Partille

Two interviews have been carried out in Partille, one with the director at the health and care administration and one with the director at the leasing department at the municipal Housing Company C.

The estimated need of assisted living in Partille today is 56 apartments, but along with the population growth, the stock of accommodation for seniors must be expanded (Partille Kommun, 2011). Forecasts indicate that there will be an increased need for nursing homes in Partille, and further beds are planned to be completed during

following years (Partille Kommun, 2011). However, the majority of the older population is in fairly good physical shape why alternative housing accustomed for seniors is needed. According to the director at health and care administration, population projections are carefully followed.

“The problem with calculations is that all 80-year-olds are not in need of home service, but there are 60-year-olds who are”. – Director of health and care administration

The director further mentions that they find it hard to estimate future need of assisted living because of the restructuring projects, where sheltered housing are converted to assisted living, and in addition many apartments with high accessibility are constructed. However, the director believes there will be an increased need of assisted living in Partille in the future.

The director further explains that the criteria to receive an apartment in assisted living in Partille are; the applying person must be existing resident in Partille, above the age of 70, and in need of home service. The last requirement is however fulfilled if the person has a partner who must assist with cooking or equally. Based on the requirements, there are approximately 40 people waiting for an apartment in assisted living today. The apartments are distributed by the health and care administration, thus not by the municipal housing company. Some people have been offered an apartment but turned down because the apartment was considered too small.

“Many of the apartments have one or two rooms, while there are just a few apartments with three rooms”. – Director of health and care administration

Strategy and policy

The health and care administration in Partille has presented a plan to develop accommodation for seniors, to be used as guidance in their work during the following ten years (Partille Kommun, 2011). As explained by the director, the health and care administration in Partille aim to collaborate with Housing Company C and other property owners in their work to develop new residential areas for seniors in terms of nursing homes and assisted living. Housing Company C is the only actor so far to be involved in this issue, although an actor to construct and operate the building is desired. The director believes a private home service company could possibly be interesting.

Financially, the municipality of Partille currently supports common areas in existing nursing homes and sheltered housing with approximately 500 000 SEK per year, as stated by the director. The health and care administration has however not yet come to a decision on whether the municipality should be involved in future assisted livings; the issue is depending on political decisions. Nevertheless, the director believes it may not be sustainable to add the costs for common areas to the rents; hence it is likely that the municipality will support the common areas of assisted living in some way.

Housing Company C generally sees more positive than negative aspects of assisted living; services can more efficiently be directed to the facility and tenants are given the opportunity to a more social life.

Existing stock of assisted living

Assisted living exists in two locations in Partille, where apartments have gradually been converted from nursing homes and sheltered housing to assisted living. These

apartments are owned by the Housing Company C, but distributed by the health and care administration.

The director at the health and care administration explains there is also senior housing in Partille, but not initiated by the municipality. The senior housing market affects the demand for assisted living, although it is hard to estimate to what extent. Private initiatives, such as the concept living Bovieran, described in Chapter 4.2.1, affects the market of assisted living as well.

Future projects

Currently, there is one assisted living project in progress in Partille. This project is managed by Housing Company C in collaboration with the health and care administration and will be completed in the summer of 2011 (Partille kommun & PartilleBo, 2010). The project will not qualify for the investments support due to the homecare requirement. However, the leasing director of Housing Company C stated that they did not have the criteria for the investment support in mind, but instead focused on a longer perspective, which is more suitable for their business. According to the leasing director, there are no plans for further assisted living projects.

The project in progress, Mosaikens Assisted Living, has a history as sheltered housing, as well as ordinary apartments, but as a consequence of refurbishing the area around Björndammen, Mosaiken was very suitable to be altered to an assisted living. Housing Company C also saw the already existing long-term lease agreement of the common facilities in the house as positive for the development since the tenants will be able to take part of the services in the socializing areas without major rental increases. According to the leasing director of Housing Company C, Mosaiken is part of a project to increase the quality of Björndammen in general.

Regarding the financial aspect, Housing Company C finances the refurbishment of the building, why the tenants just receive a smaller rental increase. Since the building is a former sheltered housing, the accessibility standard is already satisfactory, and the main investment is the new facade and balconies. The apartments are distributed by Housing Company C and according to the leasing director, the demand for Mosaiken has just met the supply.

“If a situation arises with empty apartments, Housing Company C will share the cost of the rent with the municipality. It will not be an option to rent to someone outside the target group”. – Leasing director at Housing Company C

5.3 Alingsås

Three employees at the health and care administration in Alingsås have been interviewed as a group, a project coordinator, an administrative director and an executive director.

In the recent years, the health and care administration in Alingsås realized that the aging population will put other demands on the municipality than before when it comes to housing and care. At the same time, people above the age of 65 will increase with 24 percent until 2019, according to population forecast (Alingsås kommun, 2010a). Along with the aging population, it was realized that the sheltered housing built in the 1990's was not possible to use in a satisfactory way, due to limited accessibility.

As the costs for beds in nursing homes are high, the municipality realized they had to evaluate how existing and future care of seniors should be handled. A key issue is the

living situation, since it sets the conditions for the person's quality of life, and the possibility to live independently. According to the administrative director, due to poor accessibility, and unsafe environments, many seniors have applied for nursing homes even though they were physically too healthy.

“The first intention to explore the field of assisted living was mainly to find better suited housing options for the growing senior population “. – Executive director of health and care administration

The executive director explain that the health and care department observed a need for alternative housing concepts, but that there are several possible solutions as well as actors, to initiative the new concepts. To offer a housing concept where social meetings are enhanced is something that is stated in the municipality's programme for care of seniors (Alingsås Kommun, 2010b). Assisted living is defined as;

“A rental apartment with closeness to services and social activities as well as high requirements of accessibility”. – Alingsås Kommun, 2010.

Strategy and policy

Assisted living has been in focus at different departments of the municipality of Alingsås, but with little coordination. As a result, the municipal executive committee agreed in May 2010 that there was a need for a more organized effort throughout the organization.

“We have to create a platform where we efficiently can communicate throughout the municipality, since all actors have different focus in the issue of housing and care for seniors”. –Project coordinator

In line with the background, the project “Trygga bostäder för äldre i Alingsås” was started, with the main objective to present common criteria for assisted living. These criteria are set from a long term perspective, which means that the project does not have the requirements for the investment support as guidelines. The criteria regarding age limit is something that has been discussed widely. Today, the project group dealing with assisted living, sees the target group for assisted living as people above the age of 65. However, as stated by the project coordinator;

“This is something that is still discussed, and not something that is carved in stone /.../ We have discussed if an age limit is necessary at all”. – Project coordinator.

Assisted living has mostly been discussed as rental apartments, but from the executive director point of view, all ownership types in order to offer different housing options and to meet the rising demand from the aging population are probable. There has been an investigation on building assisted living in the more remote areas of Alingsås, where the housing mainly consists of older one-family houses, but interest has been low with regards to finances and investors. The executive director believes that assisted living must be centrally located in order for property investors to share the risks. Moreover, there have been discussions whether the municipality should give financial support for common areas and service personnel in the assisted living. As the executive director expresses:

“I do not believe that the municipality will put any larger financial resources into assisted living, since the resources are not available in the budget. It is more about supportive actions of different kinds. We have to make sure that the market starts producing these kinds of housing concepts”. – Executive director of health and care administration

Existing stock of assisted living

There is some assisted living in Alingsås today (Alingsås Kommun, 2010b). Most of these apartments are converted from sheltered housing, which means the additional costs were not very high since common areas already existed. The criterion for assisted living is that the applying person has to be above the age of 65. The apartments are available through the municipal housing company, where there is a queuing system. However, according to the administrative director, the health and care administration has instruction rights for persons in special need for adapted housing. The administrative director further states that there has been a high interest for assisted living, and as of today, there are 100 people waiting for an apartment.

Future Projects

As explained by the executive director, a design competition for assisted living was arranged a couple of years ago in a central location in Alingsås. The site was reserved for constructing assisted living, as a way for the municipality to control land allocation. There was a great interest for the competition, and the winning concept was Annehem by Peab, further explained in Chapter 4.2.3. The detailed plan for this project is appealed, as of Feb 2011. Moreover, there are still discussions to what extent the municipality should be involved and give financial support.

5.4 Mölndal

Two interviews have been conducted in Mölndal; one with a controller, and previous director, at the health and care administration in the city office of Mölndal, and one with a project manager at the municipal Housing Company D.

The municipal forecast for Mölndal expects the number of citizens reaching the age of 65 to increase rapidly by 2019 (Franco de Castro, 2010). On the contrary, the number of 80 year olds will increase in a slow pace (Gustavsson, 2010). Gustavsson further states that existing supply of housing for seniors is high in Mölndal compared to the rest of the country (2010). Therefore, to meet needs of the ageing population, efforts will be prioritized to improve the existing facilities rather than expanding the housing stock (Gustavsson, 2010). The Controller agrees that senior housing is worth investing in.

“If we have nursing homes and care of seniors at today’s level by 2025, then there is no room for other activity such as schools in the municipal budget, for that reason something must be done”. – Controller, health and care administration

Strategy and policy

The controller explains that assisted living, or senior housing, is a necessary option in between ordinary housing and nursing homes, in order to make the citizens able to stay longer independently in their own home. This can benefit the municipality, since people can move to nursing homes in a later phase, or preferably, not at all. The controller further argues that nursing homes are only intended for the very sick seniors and therefore only suitable for a shorter period of time. However, the controller explains:

“We are not those who construct assisted living; rather we have to collaborate with housing companies and others in that case”. – Controller, health and care administration

A project manager at the Housing Company D explains that they speculate in the ageing population as well. Even if the growth is distinct following years, there will be a downturn further ahead, according to the project manager. However, the company have not focused too much on that downturn, but rather believe there will always be a demand for housing with extra comfort, as they in fact can be suitable for people at different stages of life.

The controller further explains that the municipality have considered if they should reserve space for home services in assisted living. But, since LOV is implemented, nothing indicates that the municipality would have service recipients in a specific house. The controller rather sees a possibility to sublet common areas to organizations or union.

Future projects

At the time of the interviews, there is one assisted living project in progress in Mölndal, as explained by the controller. For this project, Housing Company D plan to produce rentals that are not means tested, and will be available on the ordinary housing market. The project manager at Housing Company D explains that the company has initiated the project without directives from the health and care administration. Today, the company has a concept description completed and hope to begin the construction in 2012.

“In comparison to ordinary housing, these rentals will be more accessible, which will facilitate both the tenant and the home service personnel. The bottom line is to create a living where tenant can grow old and still stay in the same apartment”. - Project manager

Except for possibly the age, the housing company intend to follow the criteria for assisted living according to the investment support. However, they have not focused too much on the investment support and are still not sure about how much it will control them. The project manager explains that there have been many discussions as regards to the age limit for this project. Since the investment support could be an excellent financing source, they have considered dedicating one part of the building for people above the age of 70. However, as explained by the project manager:

“Even young people in your age may feel a need of safety. The age is not what determines if you are in need of extra safety”. - Project manager

According to the project manager, financing of the building is clearly the most critical part in the project. The basic idea of the housing company is to have socializing areas completely financed by rents. However, there is a continuous dialogue with the health and care administration regarding to what extent, and in which form, the municipality should be involved in assisted living.

“In this dialogue we always emphasize the social benefit since they know how much it cost for each person in nursing home”. – Project manager

As of today the municipality is not obliged to provide any assisted living, which is determined by political statements. But, since Housing Company D is trying to find a solution where people can stay longer in their own homes, the municipality perhaps can support and finance a part of the common areas, or be responsible for the reception, according to the controller.

5.5 Kungälv

An interview has been conducted with the director at the health and care administration, and the director of home service in Kungälv, in their city office in Kungälv.

Population forecasts in the region of Kungälv indicate that there will be approximately 20 percent more people of the age above 65 in ten years from now (Kommunstyrelsen, 2008). The population forecasts serve as basis for future plans in the care for seniors, according to the director at health and care administration. However, the director explains that forecasts are uncertain and previous predictions have not been completely correct. Needs for care is hard to estimate since it is to a great extent individual. Nevertheless, proper homes for seniors will always be required. The director explains that Kungälv is an attractive municipality and many seniors chose to relocate to the area.

According to the health and care director, Kungälv is currently investigating the average age of people living in nursing home and the average length of stay, which today is about 84 years respectively 2 years. They are analyzing how the statistics affect the home service in the municipality. The home service director explains that moving to nursing home is not a good option for someone who wants social interaction. This poses a challenge, since many seniors suffer from social isolation rather than physical illness. It is not fulfilling to offer these senior a bed in a nursing home.

The home service director believes that they have to collaborate actively with property owners since their planning of housing affect the health and care administration. If interaction can be organized, the municipality's care for senior can be improved. The home service director believes that their stock of sheltered housing fulfils the municipal responsibility for housing for seniors and that assisted living is a good complement in the ordinary housing market.

Strategy and policy

The municipality of Kungälv has no accepted plan for senior housing in particular but the home service director expresses the current state:

"The politicians are positive about assisted living, but it is still unclear what it really means". – Home service director

The home service director is concerned about the municipality's possibility to control who should be eligible to rent assisted living. Today, the municipality has the ability to preside over people in needs with sheltered housing, but for assisted living in the private housing market, they would not have the same possibility. In sheltered housing, home service is the only expense for the municipality why they found it negative if they could not keep the ability to instruct people to alternative housing instead of nursing homes. Discussions on how the municipal and private should relate to each other must be taken, according to the interviewed actors.

As explained by the home service director. Today 900 people uses home service in Kungälv and sheltered housing respond to a very small part of these, as would assisted living do.

"I cannot see the benefit in building specific for seniors. Well adjusted apartments are the best I think, and segregation is the least we want to obtain. Why would seniors wish to live close to just other seniors?" - Home service director

The home service director further states that the municipality should provide the citizens with home service. She emphasizes that the responsibility of the municipality starts when a person needs help, and this is where the financial resources should be focused.

“For us, assisted living belongs to the city planning department and our responsibility is to ensure that there are alternatives. We must work together with them to achieve a broad solution”. – Homes service director.

The director of the health and care administration mentions that the problem is not to offer service personnel two hours a day in an assisted living. Rather, if the people living in an assisted living are healthy and not in need of extra care, does not this mean municipality’s resources are devoted to an incorrect group?

When it comes to the investment support for assisted living, both of the interviewees believe that the investment support is too narrow to be attractive, especially concerning the age.

Existing stock of assisted living

Kungälv has a few sheltered housing located in specific buildings, with two or three room apartments. These apartments are means tested by the health and care administration, however the politicians are discussing if they should keep them. There have been discussions whether these apartments should be converted into assisted living but the home service director believes the municipality then will lose their ability to influence who should receive these apartments. She is afraid there will not be the need of each individual that determines the use of the apartments. The director of the health and care administrations believes further discussions has to take place before the politicians in the municipality can decide on any general plan concerning the issue.

“There must be a discussion about what is feeling secure, since this is something very individual”. - Director of health and care administration.

Future Projects

There are no actual plans for assisted living yet according to the home service director. However one project is currently in the early stage in the area of Kvarnkullen, where an assisted living house is planned to be completed in 2013. As of today, there is a concept contest with the purpose to find a developer interested in establishing the assisted living in Kvarnkullen (Samhällsbyggnadsutskottet, 2011). So far this has only been a matter for the urban planning office, and the health and care administration has not been involved. No further plans for future projects are in progress, according to the health and care director.

5.6 Kungsbacka

The director at the health and care administration in Kungsbacka was interviewed in the office in Kungsbacka.

Decision was taken in 2010 that assisted living should be included in the municipality’s future planning of housing in Kungsbacka. If assuming an age limit of 70 years for assisted living, there may be 230-780 apartments needed by 2014 (Kungsbacka, 2010).

“We have seen a great demand for alternative housing of seniors; however, we have not been able to offer anything”. – Director of health and care administration.

The director mentions that they have to rethink the planning of care since their previous calculations have only focused on the number of homes needed and not what kind of housing. She believes the demand for nursing homes will decrease if they have an option to offer between ordinary housing and nursing homes. The intention is that people can stay in transitional housing and delay a possible move to a nursing home. Extending the stock of transitional living can be seen as a preventive action.

“At the same time, we have to keep in mind that many people who would never have moved to nursing homes may end up at a transitional living”. – Director of health and care administration.

The uncertainty of the future situation of housing for seniors makes it very hard to estimate the future needs for nursing home versus transitional living. The director further explains that there are few rental apartments in Kungsbacka, which can be seen as an option for seniors who like to simplify their housing, especially in the maintenance area. The future generations of seniors are predicted to be wealthier, and they may not have the same demands. This is a challenge when planning in a long-term perspective.

“The current premises adapted for old people may not be sufficient for the future generation since they are generally small, mostly two room apartments”. – Director of health and care administration.

Strategy and policy

According to the director, the municipality of Kungsbacka has not actively participated in the debate, and development, regarding assisted living. Recently they have been through reorganization, handing over sheltered housing from care of senior citizens to home service.

Depending on the political decision, the director sees different possibilities. If it is decided that it is not the municipal responsibility to provide Kungsbacka with assisted living, the director sees an opportunity with long term lease agreement. This can create a possibility for the health and care administration to appoint apartments. The director does not believe that there is an interest from private actors to operate in assisted living if they do not get a mission from the municipality.

The director sees the feeling of safety as the largest advantage of gathering many old people in the same house as in assisted living. It would bring a large number of home service staff in the field and the tenants can support each other. The buildings can be livelier with greater social interaction thanks to meeting points.

“Gradually, it will of course change when those who live in the house are ageing”. – Director of health and care administration.

Future projects

There is one upcoming residential project in the city centre of Kungsbacka. This project is however not yet definite but waiting for political decision.

“Perhaps this project could be assisted living, the politicians are very positive about that, but the problem is that we have not solved the financing yet why we have postponed it”. – Director of health and care administration.

There will be a transitional housing in Kungsbacka, according to the director, but as of today neither the politicians, nor the concerned municipality officials has discussed the issue any further. The director mainly believes that the ambiguities of the issue has

made all involved hesitant, and are waiting for further clarification from governmental level.

Senior apartments

The stock of sheltered housing in Kungsbacka has been converted to senior apartment, as the municipal officials have chosen to call it. In the suggested criteria for senior apartments, the people should be above the age of 65.

“We found it hard to decide upon another age limit than 65, it was just the easier this way, and we will not attract that many 65 year olds anyway. We think it will sort itself”. – Director of health and care administration.

There is no requirement on common areas for senior apartments which is the main difference from assisted living. All costs for senior apartments will be covered by the rent, paid by the tenant. The municipality considered converting sheltered housing to assisted living according to the delegation’s definition until they reached the issue of financing dining room and service. They realized they could not manage that right now, since they were busy handing over to home service.

“We also have many people who live in these apartments already, and we cannot just suddenly raise the rent”. - Director of health and care administration.

Another criterion for senior apartments is that the applicant must be an existing citizen in Kungsbacka, due to the fact that Kungsbacka have many seniors moving into the municipality. For a person who is registered in Kungsbacka, loneliness is enough to be eligible for one of these apartments.

There will be a queuing system to these apartments, but the director believes there must be a balance where the health and care administration have the right to select tenants from a good purpose. The director further explains that future tenant will have a standard lease agreement for senior apartments without means testing.

“We wish to have long term lease agreement, as we have today. Then we will pay for vacant apartments if we know there will only be seniors in the house”. – Director of health and care administration.

5.7 Summary

A summary of the municipalities' approaches and plans for assisted living, as well as their involvement in assisted living, can be seen in Table 5.2.

Table 5.2 The table presents approaches to assisted living, and plans for housing for seniors, based on interviews with health and care administration as well as housing companies.

Approach to assisted living in the studied municipalities	
Göteborg	Positive about assisted living, but the municipality does not wish to be involved; instead they refer to the ordinary housing market. The municipality is however willing to give financial support for common areas.
Partille	Positive about assisted living and the municipality may give financial support for common areas in future assisted living.
Alingsås	Health and care administration has made an effort to present appropriate criteria for assisted living that fit the municipality. The municipality can perhaps give some minor financial support. However, not likely any greater subsidies.
Mölndal	Aim to improve existing stock rather than expanding. The municipality refer the provision of assisted living to the municipal housing companies.
Kungälv	The municipality are doubtful about gathering seniors in the same building. They intend to collaborate with property owners in the matter of housing for seniors, and they wish to keep instruction right.
Kungsbacka	The municipality are positive about assisted living, but have not yet solved the financing of common areas and service personnel. The want to keep instruction right for the apartments.

To summarize, it can be seen that approximately half of the interviewed representatives from health and care administrations have expressed that they wish to keep instruction right for assisted living, in order to assure that the apartments benefit the people in greatest need. This is not in accordance with the investment support. However, it has been noticed that municipalities have a long term perspective of their planning and few of the interviewed representatives from health and care administrations had any intention on strictly following the guidelines for the support, since it is uncertain that the investment support will continue after 2011.

The findings will be further discussed in relation to theory, in Chapter 7.

6 Review of the Project Development Company

This chapter present results from seven interviews with employees at a project development company, with the aim to answer the third research question:

How well can a project development company deal with the assisted living market?

During the last years, the project development company has worked with developing nursing homes for municipalities and during this process another need was identified, i.e. transitional living. Due to the forecasted population growth among seniors in the upcoming decades, and indications from municipality representatives of an increased demand for transitional living, the project development company is currently investigating the concept of assisted living, as explained by a developer at the project development company.

The project development company has found the market for assisted living attractive and made an attempt to investigate the market already in 2003 according to the head of the development department. According to a project developer, the company wants to position themselves in the front of the construction sector to offer a housing concept of assisted living that meets requirements from municipalities. All of the interviewed persons at the project development company see a great potential in the assisted living market and therefore believe it is worth spending time to investigate this. With a distinct growing target group, they believe assisted living can improve the long-term competitive position for the project development company in the construction industry.

The interviewed developers claim that the concept of assisted living fit in very well with the vision and goals of the company, i.e. focusing on core businesses in construction and development, as well as being an international company, with a leading position in selected home markets (Skanska, 2011). The district manager at believes assisted living has high potential, but claims that the concept must be concretized as business idea. The interviewees tended to see assisted living as a light version of a nursing home rather than an ordinary apartment. The head of department at project development would like the municipalities to more precisely define the concept of assisted living; he means that it is a big difference if it tends more to ordinary housing or nursing home.

An interviewed regional director and a project developer both argue that a project like assisted living may not be a finically strong project. Instead they consider it to be a complement to other businesses, with the aim to receive construction rights for larger projects. The company has little admittance to land in central locations of Göteborg, and most land is owned by municipalities. The urban planning department values development of rental apartments, and therefore possibly repays the establishment of rental apartments with land in use for other purposes. Hence, the benefits of building assisted living as rental apartments may contribute to create value for other parts of the company and support the long-term strategy of having a leading position in selected home markets.

A majority of the interviewees within the project development company believe the company has great opportunities to provide a competitive concept of assisted living thanks to the size of the company, which generate great investment opportunities, green competences, as well as the wide range of products offered. The district manager further mentions that there is knowledge within a wide range of areas, which will benefit the company.

In terms of knowledge, the head of the product development department clarify that there is a housing concept at the project development company called *Moderna Hus*, which is ordinary housing with the principal reason to lower construction costs and time. Thus, the company already has knowledge of how to reduce costs in the construction phase. Several of the interviewed persons expressed that this concept have potential to be further developed as assisted living.

“It is desirable to use an already existing product.” –Head of the project development department

As explained by a district manager, the company does however have little experience from similar projects to assisted living, which may discourage the development process, or marketing of the actual product. Moreover, a developer explains that the company does not have an organization of managing rental housing, since it is not a part of the company’s goal or vision. Therefore, in order to direct a concept of assisted living, the target group and client has to be clearly identified.

The majority of the developers tend to see the client of assisted living to be a property owner, who either maintains and operates the building, or hires an operator. Several of the interviewed developers mentioned the possibility of collaborating with other actors in the market to secure a client. The head of the project development department stated that they have not yet contacted any potential collaboration partner, although they will likely make an effort in the near future.

One developer claims it may be a good idea to first try the concept in the private market and then direct the concept towards the public investors. The head of the project development department believes it may be difficult to commence something in Göteborg, and has therefore turned focus to the smaller surrounding municipalities.

An issue that has been observed during interviews with employees at the project development company is how they should relate to public procurement act. Since the calculations for assisted living projects are strained, involvement of the municipality, in particular with financial support for common areas, is desirable. When involving the municipality, the public procurement act enforces certain bidding and procurement processes, which generate an uncertain outcome. For the project development company, public procurement usually leads to no more than a regular contract.

As explained by all interviewees at the project development company, the investment support is vital in the development of assisted living. It has been stated that without a prolongation of the investment support, it will be hard to design a profitable concept for assisted living. As of today, the interviewees at the project development company assume that the support will be extended. Several of the interviewees expressed that assisted living without investment support, or financial support from municipalities for common areas, would result in to high rents, that are neither attractive nor competitive. One of the interviewed developers expressed that without the investment support, the company would have to turn to the municipalities that are actually willing to finance common areas.

7 Discussion and Analysis

In the following section the discussion and analysis is guided by the research questions and sorted thereafter.

What are the conditions of the current market of assisted living and what factors affect the development of the market?

Current Market of Assisted Living

As described by Thompson et al. (2010), it is important to determine the dominant economic features of the market, such as market size, growth rate, potential buyers and sellers and geographic scope, to receive a greater knowledge about the context of assisted living. The results presented in Chapter 4, 5 and 6 shows that the market size and the growth rate of assisted living present potential to enter the market. The shift towards an older population creates a large group of probable end users of assisted living, and at the same time the existing supply of assisted living is undeveloped in the geographical area.

The interviews with municipality representatives show that the demand for a transitional living, such as assisted living exists. Forecasting the demand is essential to reach success and to predict the actual demand, i.e. analyze the end user and not just rely on demographics. This is of main concern in order to minimize the risk of vacancies. According to Schmitz & Brett (2001), the analysis should regard at what rent, or price, the proposed project will be absorbed in the market. Predictions indicate that the upcoming target group for assisted living are wealthier and less vulnerable for a slightly higher rent than today's seniors.

In accordance with Porter's Five Forces framework the outlook on the market can be categorized through the buyers, substitutes, suppliers, potential entrants, and rivalry among existing competitors (Johnson, 2008).

In the market of assisted living, the buyers can be identified as the client. All interviewed actors see assisted living as rental apartments, and therefore the buyers in the Five Forces framework can be identified as the potential client of a rental apartment. The client can also be a property owner, such as a municipal housing company or a private owner. An institutional investor may also be viewed as a client, but as explained by representatives from the project development company, it is not the most likely client. There are two assisted living projects in progress where the municipal housing company are clients of the project.

Substitutes to assisted living mainly consist of senior housing or other types of concept livings produced as condominiums, since they attract much of the same end users. Nursing homes and sheltered housing are not seen as substitutes since these are means tested and not possible for individuals to choose to move to.

In Porter's category of potential entrants it is likely that other project development companies are monitoring the market and deciding whether or not to enter in the near future, since the market for assisted living is in the development stage.

The force and bargain power of suppliers in accordance to the Five Forces framework, consider construction and design services and are not to be considered as significant to assisted living projects, compared to regular construction projects.

Rivalry among existing competitors is hard to predict since the market of assisted living is new. The competitors in relation to the examined project development

company are companies with similar business areas and size. Two of these competitors are involved in assisted living projects today, and between these companies, the rivalry can be considered moderate.

As Schmitz & Brett (2001) specify, location is important when constructing an assisted living. Location in the construction industry is also connected to demand and supply. It is therefore significant to get admission to a central location for the establishment. However this is not easily done in larger cities where most land is already developed. The head of the project development department believes it may be difficult to commence assisted living in Göteborg for that reason, and suggested a focus on the smaller surrounding municipalities.

Factors Affecting the Development of the Market

In accordance with the PESTEL-analysis, examination of the macro-environment in relation to assisted living considers political, legislative, economical, social, as well as technical and environmental factors that influence the market. As David & Craig (2005) implies, political, economical and legislative factors in the context of assisted living correlate. For assisted living, the investment support is a key factor that stretches over the three categories.

Predicting political decisions such as a prolongation of the investment support is difficult. But along with the project “Bo bra på äldre dar”, which has allocated financial support to feasibility studies, the government shows that it has put effort into generating assisted living projects. Therefore it is likely that some kind of support will exist in the future, both according to the concept living consultant, and the interviewed administrator at the county administrative board.

Political decisions for the general housing market and health and care policies for seniors affect the context in which assisted living is developed. Political decisions influence to what extent municipalities and the state has responsibility of providing housing options for seniors, as described by the interviewed concept living consultant. The political influence is according to the consultant the most powerful factor, which influences the context for assisted living, but is also hard to impact. David & Craig (2005), states that elections and shift in political power are sources of uncertainty. As of 2011, it is three years left of the current length in office both on governmental level, and municipal level, for Sweden and the municipalities. This provides some certainty of the general ideas of the politicians in charge.

Economically, the investment support affects the budget calculation of an assisted living project. Legislatively, the requirement of an elevated accessibility standard in assisted living makes a project developer economically dependent on the investment support since the area efficiency of assisted living is lower than in ordinary apartments.

Social factors driving changes in the industry involve demographics which, as described earlier, indicate a distinct growth of people above the age of 65 in the near future. Regarding social factors, many of the interviewed persons emphasized that institutions are not preferred, and there have been various opinions whether or not it is a good idea to gather old people in the same building as in an assisted living. Moving patterns of the inhabitants and the attitudes towards housing are also social factors which affect the context for assisted living. The young seniors of today have a quite different view of life, compared to the older seniors. As presented by the interviewed concept living consultant, the young seniors like to have a comfortable and easy life

where focus is on self-fulfillment where as older seniors have less demands and save their money for the next generation.

The technical and environmental aspects are not different from other projects in the construction industry. As the technical and environmental development is in focus in today's society, it will be important for project developers to make sure that assisted living meets the standards.

Finally, the conditions of the current market present opportunities to further explore the market of assisted living.

What requirements do the municipalities have for assisted living?

As shown in Chapter 5, the criteria of assisted living from the interviews with municipality representatives, is almost as many as the number of people interviewed. The ambiguousness experienced in the interviews is mostly connected to distinguishing assisted living from nursing homes, and the criteria for the investment support. The expressed definitions used for assisted living in the municipalities are closely related to the criteria for the investment support. However, the requirements for the investment support are interpreted in different ways. In accordance with van Bilsen (2008) there is no unanimous definition or understanding of the term assisted living, which complicates the development of a concept.

As argued by Szatek (2008) it is important to have a clear offer and description of the product to make it successful, and this is a challenge due to the ambiguity surrounding assisted living. Defining assisted living, in relation to ordinary housing or nursing homes also helps positioning the product in the product-market growth matrix, see Figure 7.1.

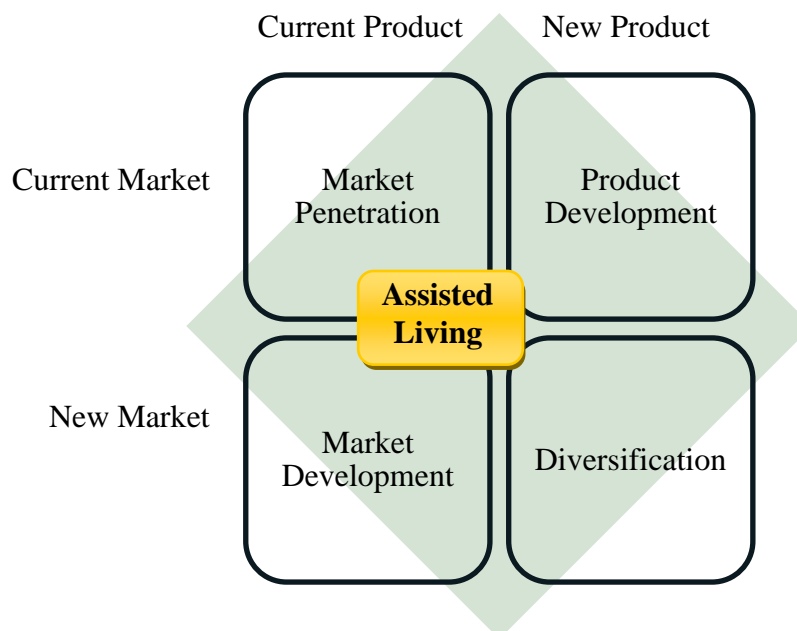


Figure 7.1 The product-growth matrix with assisted living positioned.

According to the theory of Ansoff presented in Pleshko & Heines (2008), assisted living is positioned in the centre of the product-market growth matrix. Assisted living explores and aims to attract a new market, i.e. the housing market for seniors above the age of 70 years. In addition, assisted living is positioned close to the area of product development since project developers strive to find a new product that fulfils the requirement from municipalities and potential buyers. However, assisted living is neither a completely new product, nor an entirely new market, why diversification can be excluded.

During interviews with representatives from health and care administrations in the analysed municipalities, the attitude towards assist living differed. The political management of the municipalities are essential as it forms much of the attitudes towards senior care and housing issues. Moreover, it has been observed that when representatives from health and care administrations discuss assisted living, it is from two perspectives; the healthy 70 year olds aiming for a social and easy life, or the older less independent seniors who are still too healthy to be granted nursing home. Which the real target group is, are still discussed in the municipalities.

There is also an ambiguity about who the actual client is for assisted living. It may be a private property owner, the municipality or a municipal housing company. The interviewed representatives from health and care administrations do not see the municipalities as clients of assisted living, but rather see the market handling the matter of assisted living. However, assisted living from a housing company's perspective is most likely self-developed from the housing company itself, which leaves little room for an outside development company to present a complete concept. Moreover, the interviewed municipality representatives argue that there are opportunities for private investors in the assisted living market.

Indications from the interviews carried out during this study shows that municipalities, in general, are prepared to give some financial support for assisted living projects. To what extent differs in the different municipalities due to the various perceptions of assisted living. The financial support expected from the municipal budget will most likely apply for common areas, and the service personnel. The benefit of municipalities is the gain in prolonging the stay in ordinary housing, compared to moving seniors to a nursing home. Approximately 400 000 SEK per year can be saved in municipal expenses when seniors live in accessible apartment with home service support instead of moving to nursing homes.

How well can a project development company cope with the assisted living market?

An analysis of the assisted living industry with focus on possibilities and threats is presented in Chapter 4. In addition, an internal review of the project development company, to identify strengths and weaknesses, has been presented in Chapter 6. With the aim to see how well the project development company can deal with assisted living in a changing business environment, compared to its competitors, a SWOT analysis is presented in Figure 7.2. As stated by Johnson (2008) too many factors should not be stated without considering to what extent they may impact. Therefore only factors that are considered essential are presented.

Internal	<h3>Strengths</h3> <ul style="list-style-type: none"> * Size * Knowledge * Wide range of products within the company * Green profile 	<h3>Weaknesses</h3> <ul style="list-style-type: none"> * Little experience from projects similar to assisted living
External	<h3>Threats</h3> <ul style="list-style-type: none"> * Great demand * Large target group * Investment support * Beneficial to other business areas 	<h3>Opportunities</h3> <ul style="list-style-type: none"> * Demand is not as great as indicated * Political decisions * Competitors * Public Procurement

Figure 7.2 SWOT-analysis for the project developer within the market of assisted living.

Strengths

According to Thompson et al., (2010) strengths are factors that give an organization specific advantage compared to competitors, and are of great importance for reaching a successful result. The size of the project development company makes it financially strong and provides a solid foundation to explore new products and markets.

Knowledge within the company and experience from projects similar to assisted living, such as nursing homes, is something that can generate competitive advantages to the project development company. The experience from having produced housing projects for several years, should contribute to competitive advantage that can be used to gain market shares in the market of assisted living. Moreover, the existing prefabricated multi-apartment concept has been referred to as a product that has improvement potential as assisted living concept.

There are also benefits for the project development company from offering the market a wide range of products and services. The project development company has the opportunity to offer construction services and technical consultancies along with project development. Having these internal resources may present the opportunity to offer a concept of assisted living at a lower price, or with additional valuable attribute, than competitors.

Weaknesses

As stated by Thompson et al. (2010), resource weaknesses are important to identify since these may tell what areas must be improved in the company. Even though the project development company has experience from projects similar to assisted living, they do not have any actual assisted living projects, which, on the contrary, two of the main competitors have. For these ongoing assisted living projects by competitors, the project development company has not been involved which may discourage the company in future projects.

Opportunities

As mentioned in Chapter 5, there is a great potential in the assisted living market with a large target group due to the growing senior population. In addition, the investment support provides opportunities for a development company to offer a competitive budget of assisted living.

According to Johnson (2008), competitive advantage cannot only be achieved through competition but also by collaboration. Strategic alliances aim to improve the competitive position and performance of a company by sharing resources, for instance knowledge (Ireland, Hitt, & Vaidyanath, 2002). The head of department as well as the developer at the project development company mention that they have considered collaboration partners but not yet endeavoured this any further.

“It is very important to find the right one and there is also a risk where one partner can defect.” – Head of the project development department

Some of the interviewees have stated that collaboration with e.g. a property owner is possible. However this has not been further examined from the developers.

The study has not taken the form of ownership into consideration. But, it has emerged from interviews that all actors view assisted living as rental apartments. This can present opportunities to complement the area of business for the project developer, as rental apartments is not a business area of the company today. Besides, the interviewed employees at the project development company expressed the opportunity that building rental apartments present to other business areas, such as developing and selling condominiums. As stated by Johnson (2008), strategy represents the long-term direction of a company to achieve advantages in a changing business environment. The regional director reasoned that assisted living can be seen as a complement to other areas within the project development company. Hence, building assisted living as rental apartments may contribute to create value for other parts of the company and support the long-term strategy of having a leading position in selected home markets.

Threats

According to Schmitz and Brett (2001), understanding the market is essential to generate good ideas, but there is always a risk when entering a new market. Therefore, it is important to identify those risks and external threats.

As mentioned in Chapter 5, all interviewed representatives from health and care administrations predict a demand for assisted living. Although, they tend to see the demand only based on demographics, and as Clark (2005) mentions, the senior population has less willingness to move than younger. Therefore, the demand should not only be based on the demographics, but examined among the actual potential tenants. There is a risk that the demand is not as great as expected, which is critical in order for the project development company to find a client. Interviewed

representatives from two housing companies in Göteborg do not see the demand in the same way as the municipal organization Senior Göteborg do, even though the housing companies are municipality owned and in many ways collaborate with Senior Göteborg.

Moreover, competitors and political decisions have to be concerned in the external analysis of assisted living. Political decision in terms of a potential prolongation of the investment support is crucial for the project development company. As explained by all interviewed developers at the project development company, without investment support, it will be difficult for the company to develop a profitable concept of assisted living.

Uncertainty about assisted living also concern how the project development company can deal with public procurement if the municipality is involved in assisted living, either as client or by financial assistance. A suggestion proposed during an interview with a developer at the project development company is to proactively engage in the municipalities to emphasize the importance of other criteria than lowest price during public procurement bidding. In this way, criteria such as environmental policy, quality, and work environment, may play a more important role in the enquiry giving, providing the project development company a better chance for successful outcome.

Conclusively, there are benefits to gain from the assisted living market for a project development company. Nevertheless, some factors, such as the actual demand, require further investigations.

8 Conclusions

Based on the analysis of the current market of assisted living, it can be concluded that there is a large target group and potential demand derived from the population forecasts. For that reason a market potential for project developers exist. The municipalities have realized that an alternative to nursing home is needed in order to manage the municipal budgets. Nevertheless, it is not certain that assisted living, as stated by the requirements for the investment support, is what the municipalities actually requests. Well accessible rental apartments can just as much fit the needs described in the municipalities.

Assisted living should be viewed as a part of the ordinary housing market, but as some of the municipalities request instruction rights to provide seniors with housing, it might not be assisted living according to the definition, that is actually requested. The ambiguousness regarding the requirements of assisted living in the municipalities has to be further investigated in communication with health and care administrations, as well as urban planning offices, and politicians.

It has been observed during the majority of the interviews that definitions and interpretations of assisted living are many, as well as the requirements from the studied municipalities. Therefore, assisted living should not be seen as a specific concept, but rather as an approach towards housing for seniors, aimed to municipalities, municipal housing companies, and private investors. Nevertheless, key factors of assisted living, such as high accessibility standard, socializing areas and service, should still be offered in the housing approach.

The project development company focuses to a great extent on the investment support to generate a better project budget, and lower rents. The municipalities on the other hand, do not see this support as important for assisted living projects since it is uncertain if it will be prolonged. As a result, it is more important for the project development company to meet the requirements of the specific municipality and focus on the financial support that the municipalities are prepared to give, i.e. for common areas and a service person.

Finally, assisted living can benefit the society, and also be beneficial for a project development company. The challenge is finding the right client, and a good communication with municipalities.

9 References

- Ahlström, P. (2008). *Strategier och styrsystem för seniorboendemarknaden*. Linköping: Linköping Studies in Science and Technology.
- Ahlström, P., & Nilsson, F. (2007). *Boende för äldre - utmaningar och möjligheter*. Linköping: Institutionen för ekonomisk och industriell utveckling.
- Alingsås kommun. (2010a). *Statistik för Alingsås kommun och övriga Sveriges kommuner 2010*. Accessed: www.alingsas.se, 2011-02-03
- Alingsås Kommun. (2010b). *Trygghetsboende*. Accessed: www.alingsas.se/bygga-bo-och-miljo/bostader/trygghetsboende, 2011-02-01
- Bonum. (2011). *Om Bonum*. Accessed: Bonum Seniorboende: http://www.bonumseniorboende.se/om_bonum/bonum_seniorboende.html, 2011-02-17
- Bostads AB Poseidon. (2011). *Om Projektet*. Accessed: Stackmolnsgatan - samverkan för bekvämt boende: <http://www.poseidon.goteborg.se/sv/Stackmolnsgatan/Om-projektet/>, 2011-02-17
- Boverket. (2011). *About Boverket*. Accessed: www.bokverket.se, 2011-05-05
- Boverket. (2010). Information om investeringsstöd till äldreboenden. *Blankett nr: 1164 utg 5*. Sverige: Boverket.
- Boverket. (2008). *Planera bygga bo*. Karlskrona.
- Bovieran. (2009). *Bovieran*. Accessed www.bovieran.se, 2011-01-31
- Bryman, A., & Bell, E. (2007). *Business research methods*. Oxford: Oxford University Press.
- Clark, W. (2005). What do seniors spend on housing? *Statistics Canada- Canadian Social Trends*, Catalogue No. 11-008.
- David, J. C., & Craig, T. (2005). *Organisations and the business environment*. Butterworth-Heinemann
- Franco de Castro, P. (2010). *Befolkningsprognos Mölndal Stad 2010-2019*. Mölndal: Stadsbyggnadskontoret.
- Gaskell, G. (2000). Individual and Group Interviewing. in M. W. Bauer, & G. Gaskell *Qualitative researching with text, image and sound: a practical handbook*. London: SAGE Publications Ltd.
- GR. (2010). *Personalbehovsprognos för GR-kommunerna Sociala området 2010-2020*. Accessed: www.grkom.se, 2011-03-10
- Gustavsson, L. (2010). *Verksamhetsberättelse 2009 Vård och Omsorg*. Mölndal: Mölndal Stad.
- Göteborgs Stad. (2006). *Befolkningsstruktur och bostadsbestånd - Översiktlig kartläggning med fokus på morgondagens äldre i Göteborg 2005-2015*. Göteborg: Göteborgs Stad.
- Göteborgs Stad. (2011). *Senior Göteborg*. Accessed: www.goteborg.se/wps/portal/seniorgoteborg, 2011-02-01
- Hjälpmiddelsinstitutet. (2011). *Swedish Institute of Assistive Technology - SIAT*.

- Accessed: www.hi.se, 2011-04-01
- Håkansson, H. S. (2006). No business is an island: The network concept of business strategy. *Scandinavian Journal of Management, Volume 22, Issue 3* , 256-270.
- Ireland, D. R., Hitt, M. A., & Vaidyanath, D. (2002). Alliance Management as a Source of Competitive Advantage. *Journal of Management* 28(3) , 413–446.
- Johnson, G. (2008). *Exploring Corporate Strategy*. Harlow: Financial Times Prentice Hall.
- Klingberg, A., & Hermansson, M. (2010). Strategier och ramverk för mellanboendeformer för äldre i Göteborgs stad. Göteborg: Göteborgs Stad Stadskansliet.
- Kommunstyrelsen Kungälv. (2008). *Utveckling av boende för äldre på Kvarnkullen*. Kungälv. Accessed: www.kungalv.se/upload/Bloggar/Dokument/Kvarnkullen%20beslutsunderlag.pdf, 2011-04-03
- Kungsbacka. (2010). *Beslut 21 januari 2010* . Accessed: http://www.kungsbacka.se/upload/V%C3%A5rd&Omsorg/Aldreomsorg/Dokument/Protokoll%20n%C3%A4md%202010/%C3%84O_Prot%20N%C3%A4%20100121.pdf, 2011-03-17
- Kungälvs Kommun. (2010). *Servicelägenheter*. Accessed: <http://www.kungalv.se/Stod-och-omsorg/Stod-till-aldre/Aldreboende/Servicelagenheter/>, 2011-03-15
- Kvale, S., & Brinkmann, S. (2009). *Den kvalitativa forskningsintervjun*. Lund: Studentlitteratur.
- Lakshman, M. S. (2000). Quantitative vs Qualitative Research Methods. *Indian Journal of Pediatrics* , 369-377.
- Majbacken bogemenskap. (2011). *Välkommen till Majbackens bogemenskap*. Accessed: <http://www.majbacken.org/>, 2011-03-01
- Merriam, S. B. (2006). *Fallstudien som forskningsmetod*. Lund: Studentlitteratur.
- Mölnålsbostäder. (2011). *BiG/KORNET Kooperativ hyresrättsförening* .Accessed: <http://www.molndalsbostader.se/meny/varaomraden/bifrostbigkooperativ.4.7e7132ec1154fe96e5980008789.html>, 2011-03-10
- Next Step Group . (2010). *Next Step Living*. Accessed: <http://www.nsgroup.se/undersidor/koncept/living.html>, 2011-02-22
- Partille kommun & PartilleBo. (2010). *Mosaikens trygghetsboende*. Partille: Partille Kommun.
- Partille Kommun. (2011). *Vård- och Omsorgsnämndens plan för äldreomsorgen 2011-2021*. Partille Kommun: Vård- och omsorgsförvaltningen.
- Peab. (2010). *Senior- och trygghetsbostäder*. Accessed: www.peab.se/annehem 2011-02-17
- Pleshko, L. P., & Heiens, R. A. (2008). The contemporary product-market strategy grid and the link to market orientation and profitability. *Journal of Targeting, Measurement and Analysis for Marketing: Vol. 16, Iss. 2; pg. 108-115* .

- Porter, M. E. (1985). *Competitive Advantage: Creating and Sustaining Superior Performance*. New York: Free Press.
- Porter, M. E. (1979). *How Competitive Forces Shape Strategy*. Harvard Business Review.
- Stake Robert E. (1995). *The art of case study research*. USA: Sage Publications
- SABO & Svenska Kommunförbundet. (2004). *Kvarboende + tillgänglighet = god ekonomi?* SABO & Svenska Kommunförbundet.
- SABO. (2007). *Från Servicehus till Seniorboende*. SABO.
- Samhällsbyggnadsutskottet. (2011). Sammanträdesprotokoll. Kungälv. Accessed: <http://www.kungalv.se/upload/Politik/Protokoll/Samh%C3%A4llsbyggnadsutskottet/%202011/2011-03-03.pdf>
- Schmitz, A., & Brett, D. L. (2001). *Real Estate Market Analysis: A Case Study Approach*. Washington DC: The ULI -the Urban Land Institute
- Schostak, J. (2006). *Interviewing and Representation in Qualitative Research*. Maidenhead: Open University Press.
- Schön, P., & Wånell, S. E. (2005). Historiska misstag upprepas när servicehus blir seniorboende. *Äldre i Centrum* , Nr 3.
- Scott, R. A., & Marks, N. E. (1968). *Marketing and its environment : some issues and perspectives*. Belmont, Calif: Wadsworth Publishing Company.
- SEB. (2011). *Om Boviva* . Accessed: www.seb.se/pow/kampanjer/livsstil55/index.asp, 2011-02-17
- Senior Göteborg. (2010). *Bo Bekvämt Hemma*. Göteborg: Göteborgs Stad.
- Seniorgården. (2008). *Seniorbostäder för dig över 55 år*. Accessed: www.seniorgarden.se/Templates/Pages/TwoColumnPage.aspx?id=7185, 2011-02-17
- Shafer, S. M., Smith, J. H., & Linder, J. C. (2005). The power of business models. *Business Horizons* , 48 (3), 199-207.
- Silverman, D. (2000). *Doing Qualitative Research - a Practical Handbook*. London: Sage Publications.
- Silverman, D. (2010). *En mycket kortfattad, ganska intressant och någorlunda billig bok om Kvalitativ Forskning*. Lund: Studentlitteratur AB .
- Skanska. (2010). *Skanska Annual Report 2010*. Stockholm: Skanska.
- Skanska. (2011). *Våra mål*. Accessed: www.skanska.se/sv/Om-Skanska/Kort-om-Skanska/vara-mal/, 2011-06-04
- SKL. (den 11 Dec 2009). *Sveriges Kommuner och Landsting - Översättning av kommunala begrepp*. Accessed: www.skl.se/bestall_och_ladda_ner/oversattningar_av_kommunala_begrepp, 2011-02-20
- Socialdepartementet, (2010). Regeringsbeslut 2010-07-15 nr. III:3 - Uppdrag om Bo bra på äldre dar. *S2010/5354/ST* . Stockholm.
- Socialstyrelsen. (2009a). *Lägesrapport - Vård och omsorg av äldre*. Stockholm: Socialstyrelsen.

- Socialstyrelsen. (2009b). *Äldre - vård och omsorg andra halvåret 2008*. Stockholm: Socialstyrelsen.
- SOU 2002:29. (2002). *Riv ålderstrappan! Livslopp i förändring*. Stockholm: Socialdepartementet.
- SOU 2007:103 . (2007). *Bo för att leva - Seniorbostäder och trygghetsbostäder*. Stockholm: Edita Sverige AB.
- SOU 2008:113. (2008). *Bo bra hela livet*. Stockholm: Edita Sverige AB.
- Statistiska Centralbyrån. (2010). *Befolkningsframskrivning 2010-2060*. Statistiska Centralbyrån.
- Statistiska centralbyrån. (2010). *Befolkningsstatistik*. Accessed: www.scb.se/Pages/TableAndChart____308468.aspx, 2011-05-03
- Szatek, A. (2008). *Konceptstyrd utveckling - förnyelse av produkter, tjänster och marknader*. Lund: Studentlitteratur.
- Thomas, A. B. (2006). *Research Concepts for Management Studies*. New York: Routledge.
- Thompson, A., Strickland, A. J., & Gamble, J. (2010). *Craftin & Executing Strategy - The Quest for Competitive Advantage - Concepts and Cases*. McGraw-Hill.
- Thomsson, H. (2002). *Reflexiva intervjuer*. Lund: Studentlitteratur.
- van Bilsen, P. M., Hamers, J. P., Spreeuwenberg, C., & Groot, W. (2008). Sheltered housing compared to independent housing in the. *Scandinavian Journal of Caring Sciences* , ss. 265-274.
- Yin, R. (2003). *Case Study Research - Design and Methods 3rd edition*. USA: Sage Publications.

Appendix

List of Interviewees

Health and care administration	
Municipality of Göteborg	Group interview with process manager of Senior Project and real estate project manager
Municipality of Partille	Director of health and care administration
Municipality of Mölndal	Controller at health and care administration
Municipality of Alingsås	Group interview at the health and care administration with; executive director, project coordinator, and administrative director.
Municipality of Kungälv	Director of health and care administration
Municipality of Kungälv	Group interview with director of health and care administration and business manager
Municipal housing companies	
Housing Company A	Information manager
Housing Company B	Group interview with marketing director, and two housing developers
Housing Company C	Leasing director
Housing Company D	Project manager
External actors	
Property management firm	Consultant in Concept Living
County administration board	Administrative officer
Project development company	
Skanska Project Development	Three project developer and the head of the project development department
Skanska Sweden	District manager
Skanska Residential Development Nordic	Regional manager