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The EAST Research Network and the Ageing Crisis in Eastern Europe

Oxford Institute of Ageing Showcase Day
18 March 2009

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Outline

1. Population ageing in Eastern Europe – key facts
2. The 'Ageing Crisis' in Central & Eastern Europe (CEE)
3. The EAST research network at the OIA
4. Examples of OIA research on ageing in CEE
 - 4.1 Fighting poverty + social exclusion
 - 4.2 Reconciling work + care for older family members
 - 4.3 The 'care drain' from Eastern Europe: migrant care workers





1.

Population Ageing in Eastern Europe – Key Facts





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Eastern Europe





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Drivers of population ageing

1. Mortality

- (rising) life expectancy → larger share of older people

2. Fertility

- (declining) birth rates → smaller share of younger people

3. Migration patterns

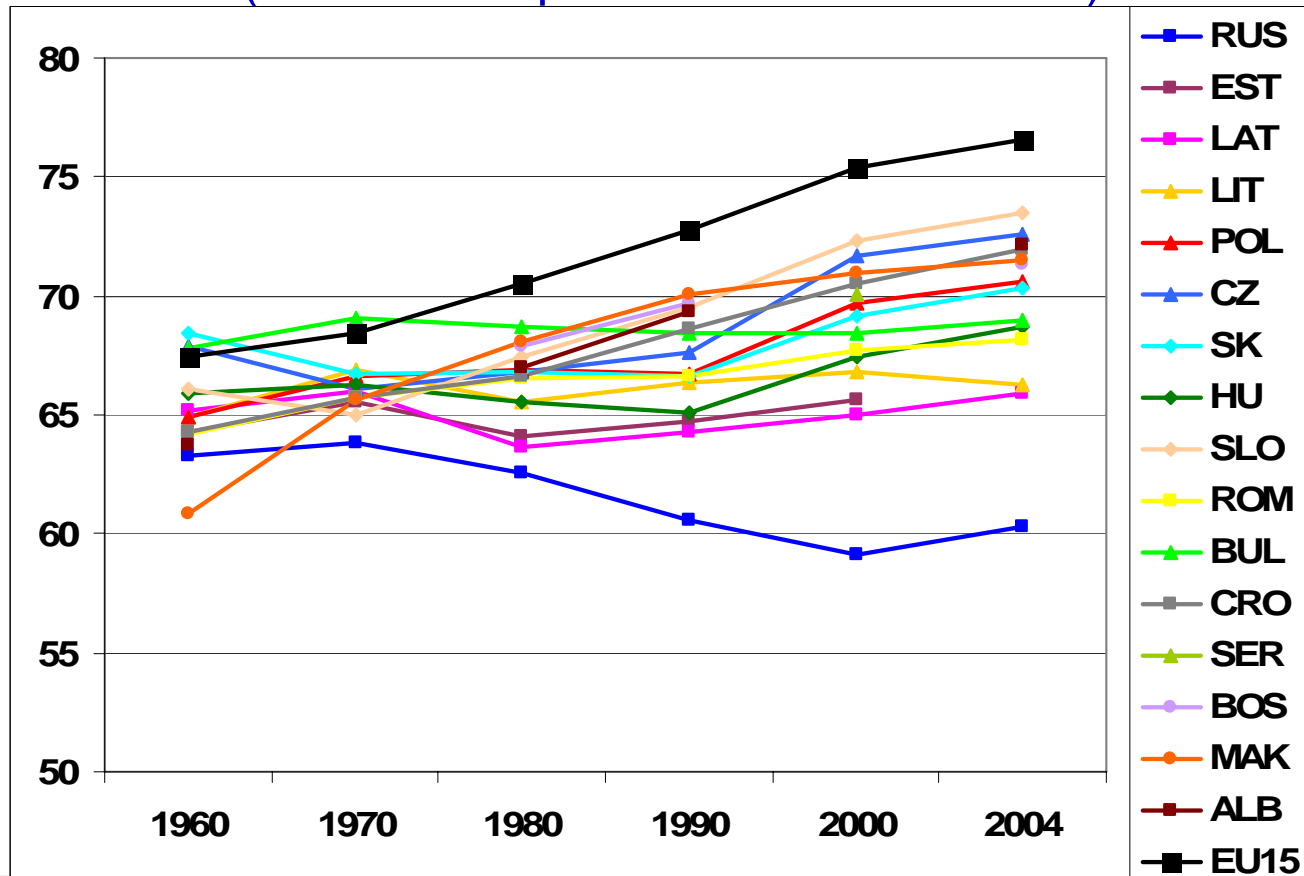
- number and age of immigrants/emigrants





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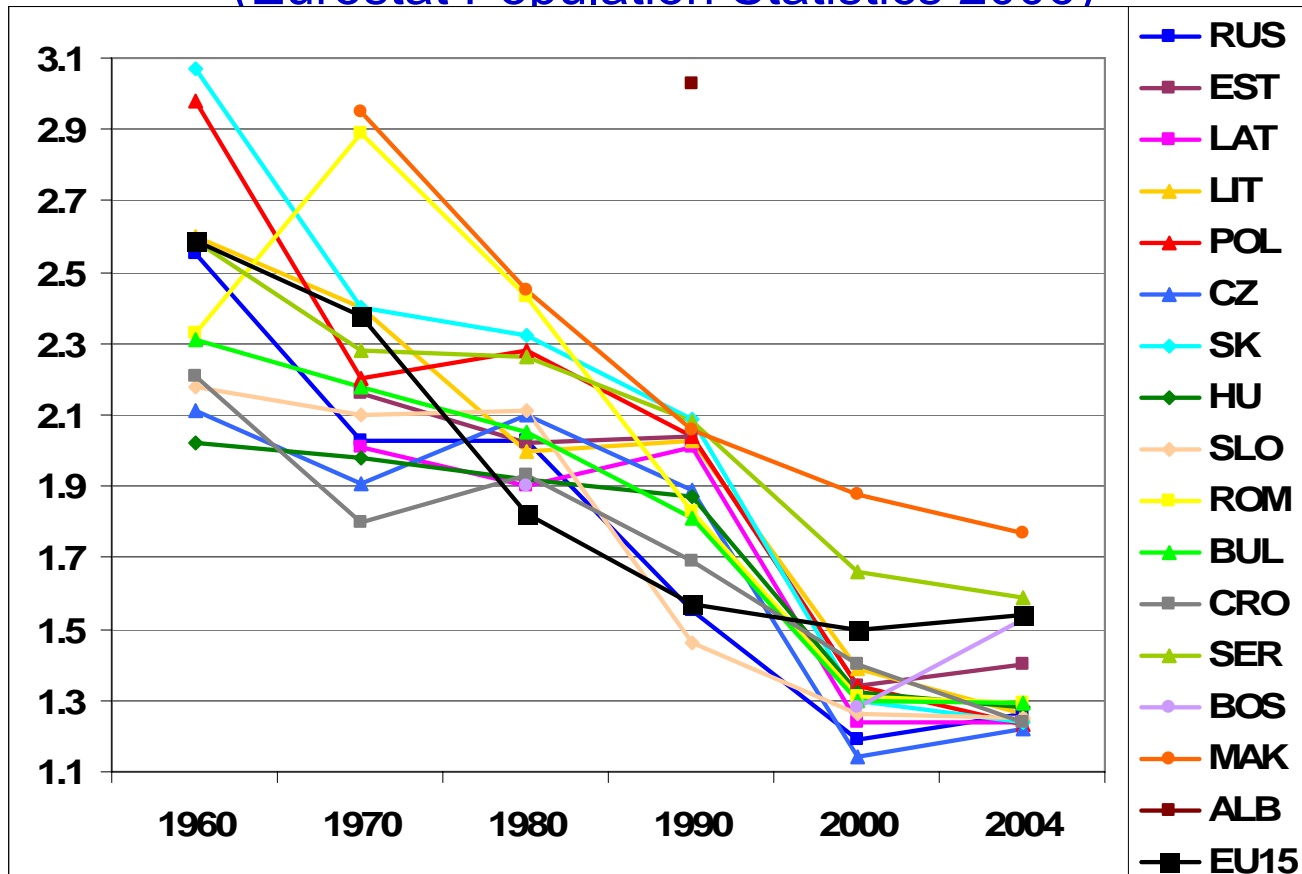
Male life expectancy at birth (Eurostat Population Statistics 2006)





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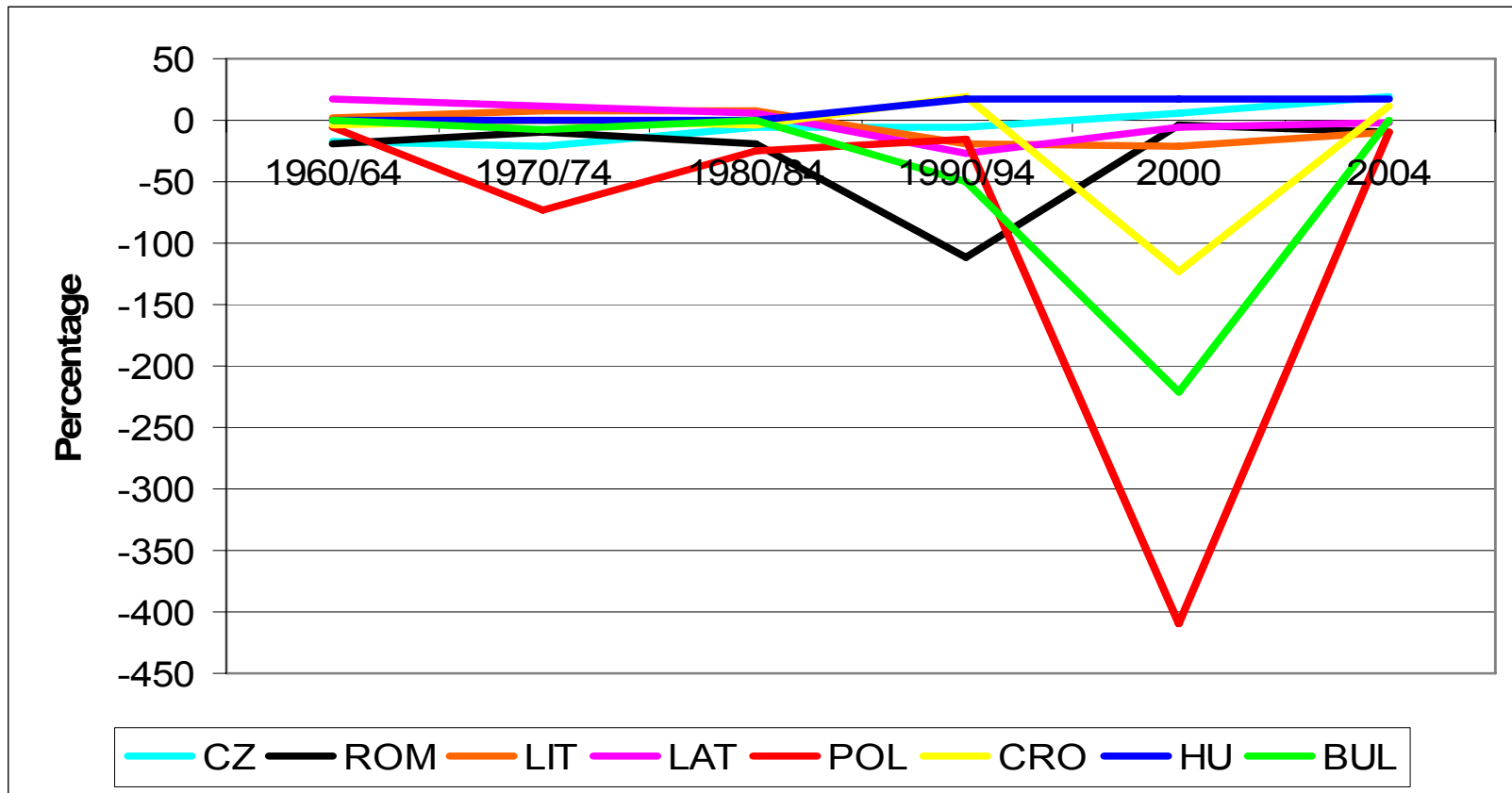
Total fertility rates (Eurostat Population Statistics 2006)





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Net migration (+ immigration, - emigration) (Eurostat Population Statistics 2006)





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OVERVIEW

FROM RED TO GRAY

*The "Third Transition"
of Aging Populations
in Eastern Europe and
the Former Soviet Union*



THE WORLD BANK



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2.

The 'Ageing Crisis' in Eastern Europe





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Western Europe got rich before it became old.

The Central and Eastern European countries are getting old before they become rich.





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From ,Socialist‘ to ,Ageing‘ Societies

- 2009 = 20th Anniversary of the “Velvet Revolution” / “Peaceful Revolution” in Central and Eastern Europe (CEE) in 1989
- Rapid process of re-organisation of social institutions (Worldbank / IMF ‘shock therapy’)
- Eastern Europeans unprepared for these changes
- Dramatic changes of people’s lives, including:
 - ⇒ devaluation of degrees / qualifications
 - ⇒ mass unemployment (unemployment previously unknown)
 - ⇒ rapid inflation → devaluation pensions / savings
 - ⇒ rapid increase in prices for formerly subsidised products (incl. medicine, public transport)
 - ⇒ deteriorating health care provision (former Soviet Union)
 - ⇒ poverty / social exclusion
- ➔ **widening gulf between rich and poor**





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% PROBABILITY OF DYING BETWEEN AGES 15 AND 60
(males) (WHO (2006): The World Health Report)

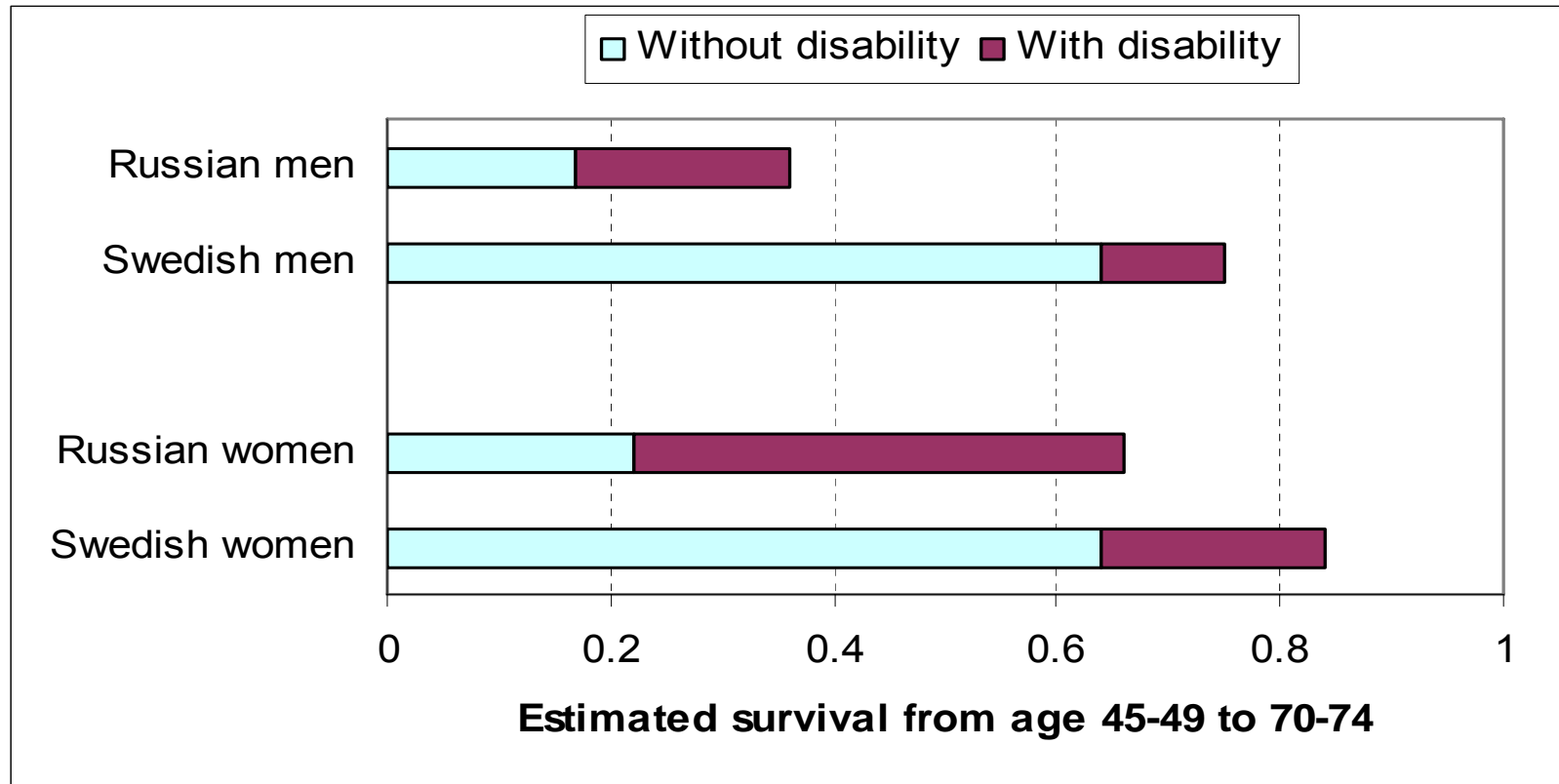
LESOTHO	84.5
RUSSIA	48.5
BOLIVIA	24.8
SRI LANKA	23.2
COLOMBIA	22.6
PAKISTAN	22.2
SWEDEN	8.2





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Survival from age 45-49 to 70-74 in Russia and Sweden
(Bobak, Murphy, Pikhart & Marmot 2004, BMJ)





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Growing social exclusion of Russian pensioners



“After paying utility bills, such as the telephone or electricity and buying very basic food products, such as bread, milk, eggs, vegetable oil, carrots, potatoes, onion, porridge, and tea, there is no money left. It is simply not possible to pay for medicine, shampoo, tooth-paste, deodorants, or public transport at all. Also, there is no way to buy any clothes, books, to go to the theatre at least once in five years, use the internet, and things like that. It is also not possible to invite guests for a birthday party and it is certainly not possible to buy birthday presents for friends and relatives. An older person in Russia feels totally isolated from society.”
(Senior citizen, Moscow, 2005)





3.

The 'Eastern-European Ageing Societies in Transition' (EAST) Research Network





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<http://www.ageing.ox.ac.uk/east/main.html>



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EAST



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EAST is the Eastern European Research Network of the Oxford Institute of Ageing

Working closely with colleagues throughout Eastern Europe the Institute undertakes collaborative research on issues of ageing and assists in capacity building through its training and mentoring programmes.



The acronym EAST stands for “Eastern-European Ageing Societies in Transition” and is a research network in the making. It brings together people interested in research on ageing from the former communist societies in Central Eastern, South Eastern and Eastern Europe. It involves gerontologists and geriatricians from the ‘new’ EU Member States Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia, as well as Albania, Bosnia and Herzegovina, Croatia, Macedonia, Montenegro, and Serbia on the one hand and Armenia, Azerbaijan, Belarus, Georgia, Moldova, Russia, and the Ukraine on the other.

Members of the network do not only have in common an interest in gerontological or geriatric research – they also share biographies in a societal system quite different from the contemporary (capitalist) market societies in Europe. Moreover, the post-communist societies (which, in fact, also include East Germany) face demographic challenges that are slightly different from those experienced by the ‘old’ EU Member States: Population ageing set in later than in the West. However, its course and impact are likely to be more severe than in the West, due to more rapid demographic changes in the absence of generous social security systems. Although life expectancies are still lower than in the West, some countries are catching up quickly (Slovenia, for example). Fertility rates are well below the EU average. Many young people are moving to the West to escape unemployment or to find better job prospects in general. As a consequence, the post-communist populations are ageing even more rapidly than Western societies. Old-age dependency ratios are projected nearly to reach EU15 average within the next 20 years in Slovenia, the Czech Republic and Hungary; in Bulgaria even surpassing this level (Eurostat 2005).

The EAST network welcomes everyone interested in the research on ageing in the above-mentioned countries. For more information on the network please feel free to contact:

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Purpose of the EAST Research Network

Objectives:

- Provide a platform for people with a research interest in demographic ageing and ageing societies in the CEE countries ⇒ EAST Website + mailing list (n = 165)
- Circulate information on relevant research, statistics, literature, etc
- Organise workshops & conferences on ageing in CEE
- Write publications on ageing in CEE
- Initiate research on ageing issues in CEE
- Capacity building (‘Bank of expertise’)
- Funding opportunities (Partner in funding applications; Leslie Kirkley Fellow 2007 Ausra Maslauskaite from Lithuania)





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Hilary Term 2006 James Martin Seminar Series

“Implications of Population Ageing in Central/Eastern Europe”

(Convenor: Dr Andreas Hoff)

- **19 Jan 2006** - Dr Zsuzsa Szeman, Hungarian Academy of Sciences, Budapest
Demographic and Social Ageing in Central and Eastern Europe
- **26 Jan 2006** - Dr John Round, University of Leicester
The Responses to Marginalisation amongst the Elderly in Post-Soviet Russia/Ukraine
- **02 Feb 2006** - Prof Nick Manning, University of Nottingham
Social Policy Reforms in Central and Eastern Europe since 1990
- **09 Feb 2006** - Prof Ewa Fratzczak, Warsaw School of Economics
Ageing and Intergenerational Relationships in Poland
- **16 Feb 2006** - Dr Christopher M Davis, Dept of Economics, Oxford
Ageing in Russia during Transition
- **23 Feb 2006** - Dr Andreas Hoff, Oxford Institute of Ageing
Research on Ageing in Central and Eastern Europe
- **02 Mar 2006** - Dr Jolanta Perek-Bialas, Jagiellonian University of Cracow
Barriers for Employment of Older People in Poland
- **09 Mar 2006** - Dr George Leeson, Oxford Institute of Ageing
Migrants and Migration in Europe





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ESRC Workshop “Understanding the Drivers of Population Ageing in CEE”

20-21 September 2007

- **Welcome + Introduction** (*Dr Andreas Hoff, OIA, University of Oxford*)
- **Keynote lecture “Health inequalities and population ageing in CEE”**
Professor Sir Michael Marmot, UCL London
- **Understanding the drivers of population ageing in CEE (I) – Mortality**
Dr Emil Hristov, Bulgaria, Bulgarian Academy of Sciences
Dr Arjan Gjonca, Albania, London School of Economics
- **Understanding the drivers of population ageing in CEE (II) – Fertility**
Professor Ewa Fraczak, Poland, Warsaw School of Economics
Professor Sarmite Mikulioniene, Lithuania, Mykolas Romeris University Vilnius
- **Understanding the drivers of population ageing in CEE (III) – Migration**
Dr Zsuzsa Szeman, Hungary, Hungarian Academy of Sciences
Dr Agnes Nemenyi, Romania, University Babes-Bolyai, Cluj-Napoca
- **Implications of population ageing for family relations and caregiving**
Professor Valentina Hlebec, Slovenia, University of Ljubljana
Dr Piotr Czekanowski, Poland, University of Gdansk
Dr Vira Chaykovska, Ukraine, Institute of Gerontology Ukraine Kiev
- **Policy implications of population ageing in CEE**
~~*Professor Gaiane Safarova, Russia, Saint-Petersburg, Russian Academy of Sciences*~~
Professor Leonid B Lazebnik, Russia, Moscow, Russian Gerontological Society
Dr Sandra Švaljek, Croatia, Institute of Economics Zagreb



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Publications on ageing in CEE

- Hoff, A. (2008): Population Ageing in Central and Eastern Europe as an Outcome of the Socio-economic Transition to Capitalism. *Socialinis darbas*, 8(2): 14-25.
- Hoff, A. & Perek-Bialas, J. (Eds.) (2009): *The Ageing Societies of Central and Eastern Europe: Some Problems – Some Solutions*. Cracow: Jagiellonian University Press.
- Hoff, A. (Ed.) (2010): *Population Ageing in Central and Eastern Europe and Societal and Policy Implications*. Aldershot: Ashgate (in preparation; submission November 2009; publication in 2010).





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Bank of expertise

Name	Lucie Vidovičová
Institutional affiliation	Faculty of Social Studies, Masaryk University in Brno
Contact details	Joštova 10, 602 00 Brno, Czech Republic , vidovicova@fss.muni.cz
Bio-sketch	Lucie Vidovičová, Ph.D., is a sociologist and researcher at the Faculty of Social Studies, Masaryk University in Brno, Czech Republic. She has a long-term research interest in the sociology of ageing, age discrimination, attitudes towards ageing, active ageing and age-mainstreaming. She has been involved in research for the Czech Ministry of Labour and Social Affairs on ageing, family and social policy. She works as a consultant on the implementation of NGO projects such as <i>Ageing and the media</i> (www.spvg.cz) and <i>Teaching about ageing</i> .
Research interests	age discrimination, active ageing, population ageing
Methodological skills	basic statistic methods, SPSS, qualitative interpretative methods (ATLAS/ti)
Teaching/training	Courses for Institute of Further Education in health care sector; tailor-made courses for primary school teachers and journalists
Current/planned research	Ageing, age and discrimination - qualitative study (2006) and survey in Czech population (2007) – see www.ageismus.cz
Recent publications	Vidovičová, L. (2005): “The Preference Model of Activity in Advanced Age“, <i>Ageing International</i> , 30(4): 343 –362.



4.

Examples of OIA Research on ageing in Eastern Europe





4.1

Fighting Poverty and Social Exclusion





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Fighting poverty and social exclusion



Research project “*Tackling Poverty and Social Exclusion of Older People – Lessons from Europe*” (2006)

- funded by Help the Aged
- OIA researchers Hoff + Leeson
- Conducted expert interviews with academics, NGO representatives + policy makers in EU25
- Including Czech Republic, Estonia, Hungary, Lithuania, Poland, Slovakia, and Slovenia
- Social exclusion of older people widespread + invisible (E + S EU)
- Lack of family support = highest risk





4.2

Reconciling Work and Care for Older People





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Reconciling work and family care



Workshop series “Reconciliation employment and care for older family members” (2007/8)

- funded by John Fell Fund
- OIA researchers Hoff, Leeson, Ruicheva + Kaiser
- we organised 3 workshops on state-of-the-art, family carer perspective, and employer/enterprise perspective
- Particular focus on Eastern Europe
- seminar participants from Bulgaria, Hungary, Lithuania, Poland, Romania, Slovenia
- Received funding from Volkswagen Foundation for **research project “Between Job and Care” (2009/10)**





4.3

The 'Care Drain' from Eastern Europe - Migrant Care Workers





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Migrant care workers from Eastern Europe

Workshop series “Migrant Labour in Eldercare” (2007/8)

- funded by NORFACE
- OIA researchers Leeson, Hoff + Kaiser
- we organised 4 workshops on economic, family, social policy + societal implications in migrant sending+migrant receiving countries
- all European sending countries in Eastern Europe
- seminar participants from Hungary, Poland, Romania, and Slovenia
- Submitted research proposal to NORFACE



Herbert Schmidt und Ela verstehen sich trotz Sprachproblemen gut

Welche Ausbildung haben die polnischen Haushaltshilfen?

♦ Renata Föry ist Geschäftsführerin von „seniocre24“: Die Frauen kommen aus verschiedenen Berufen. Aber alle haben zu Hause bereits Angehörige gepflegt. Das ist in Polen so üblich, da gibt es keine Pflegedienste oder Altenheime.

Was kostet eine polnische Haushaltshilfe?

Das hängt von den Sprachkenntnissen ab: 1400 Euro monatlich bekommt jemand ohne Deutschkenntnissen, bei perfekten Sprachkenntnissen kostet eine Hilfe nicht

unter 1700 bis 1800 Euro.

Wie lange dürfen die Frauen in Deutschland bleiben?

Jetzt gilt die Dienstleistungsfreiheit. Das Entsendegesetz schreibt vor: Die polnische Firma darf für ein Jahr jemanden entsenden. Dann müssen die Frauen zwei Monate zurück nach Polen. Danach können sie wieder ein Jahr in Deutschland arbeiten. Aber die meisten bleiben nicht so lange ohne Unterbrechung, denn sie müssen sich auch um ihre eigene Familie kümmern.

HAUSHALTSHILFE AUS POLEN „Ich bin froh, dass es Ela gibt“

Herbert Schmidt (74) aus Barsbüttel bei Hamburg ist auf seinen elektrischen Rollstuhl angewiesen. Nach einem Schlaganfall vor zehn Jahren ist er teilweise gelähmt. „Meine Mutter hat ihn gepflegt“, sagt Tochter Beate. „Doch als sie im April starb, mussten wir Kinder uns schnell etwas einfallen lassen, wie wir Vater versorgen.“ Für kurze Zeit war Herbert Schmidt in einem Heim. „Aber er war Bauer, hat sein Leben lang hier gelebt und wollte in der Nähe des Hofes bleiben.“ So sind seine Kinder auf die Agentur „seniocre24“ aufmerksam geworden. Die vermittelt Haushaltshilfen wie Ela Koto-

wicz (45) aus Stargard bei Stettin. „Wir haben einen Vertrag mit der Agentur geschlossen. Ela ist bei der polnischen Firma angestellt. Wir zahlen der Agentur rund 1500 Euro im Monat, haben Ela praktisch nur ausgeliehen. Das ist ganz legal.“

Seit drei Monaten führt sie den Haushalt, wohnt auch mit im Haus. Herbert Schmidt ist mit Ela zufrieden. „Aber es ist nicht einfach, wenn jetzt eine Fremde da ist.“ Die Pflege übernimmt weiter ein Pflegedienst. „Morgens kommt jemand, holt Vater aus dem Bett, hilft beim Duschen und Ankleiden. Das zahlt die Kasse“, sagt Tochter Beate Schröder. Nach dem Frühstück fährt der Se-



Ein Wörterbuch hilft, wenn Beate Schröder (r.) und Ela manchmal das richtige Wort fehlt

„Ich habe meine Mutter gepflegt“

früher meine Mutter und die Schwiegermutter gepflegt. In Polen gibt es kaum Arbeit, und ich muss zwei erwachsene Kinder und meine Eltern unterstützen. Die Atmosphäre hier ist nett, ich fühle mich wohl.“ Ihre Firma hat ihr einen Deutschkurs bezahlt, sie lernt täglich dazu. „Ich verstehe schon viel, traue mich aber noch nicht zu sprechen.“

Und auch Beate Schröder ist mit der Unterstützung aus Polen zufrieden. „Das ist eine schnelle und zuverlässige Lösung. Alle drei Hilfen aus Polen, die wir hatten, waren gut. Sie sind grundehrlich, man kann ihnen vertrauen.“

nior im Elektrocar zu seinem Hof. Der ist 150 Meter entfernt. Ela kauft inzwischen ein und macht Mittagessen. Seine einzige Kritik: „Ela kocht polnisch. Viel Fleisch ...“ Künftig soll mehr Salat und Gemüse auf den Tisch kommen. „Die Verständigung klappt – mit Händen und Füßen.“ Um 21 Uhr hilft Ela Herbert Schmidt ins Bett.

Und welche Vorteile hat Ela durch die Arbeit? „Ich habe zwar bei einem Steuerberater gearbeitet, aber

Vollmacht und Verfügung ➔ Richtig formulieren

Es kann jeden Tag passieren: Unfall, Schlaganfall oder Krankheit. Plötzlich ist man nicht mehr in der Lage, über sich selbst und seine Angelegenheiten zu entscheiden. Dr. Vollert Hensen, Rechtsanwalt und Notar a.D. aus Glinde, rät: Spätestens ab dem 60. Lebensjahr sollten Sie Vorsorge treffen.





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**Thank you all very much for
your attention!**

