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“National, Regional and Local Social Inclusion Strategies for Older People in Europe”

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Outline

1. The social exclusion/inclusion concept
2. European welfare state regimes
3. The OIA-HtA Study “Social Inclusion Strategies for Older Europeans“
4. Older Europeans and social exclusion
5. National, regional and local social inclusion strategies for older Europeans
6. Conclusions: Social inclusion strategies in line with welfare state regimes?





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1. The social exclusion concept

- Origins in post-war social catholic + order liberal thought tradition (France, West Germany) – developed to deal with social consequences of free market forces (Byrne 2005)
- In the UK, social exclusion used as multidimensional alternative to *poverty*
- Whereas *poverty* refers to the lack of material resources, especially income, *social exclusion* is a more comprehensive concept referring “...to the dynamic process of being shut out, fully or partially, from any of the social, economic, political or cultural systems which determine the social integration of a person in society.” (Walker & Walker 1997)
- refers to incapability to fully participate in social life (Barry





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1. The social exclusion concept

- Horizontal comparison of disadvantage – poverty vertical perspective
- helps to identify ‘cumulative disadvantage’ (Silver & Miller 2003)
- Social exclusion = process, inherently dynamic (Byrne 2005)
⇒ individual experience linked to social change, history
- Spatial dimension: e.g. Neighbourhoods
- Social exclusion has become core element of *Third Way* ideology – critics argue its horizontal nature distracts from class differences (e.g. Veit-Wilson 1998, Béland 2007)
- Social exclusion has become core of EU social policy
⇒ ‘Open Method of Coordination’ to tackle social exclusion





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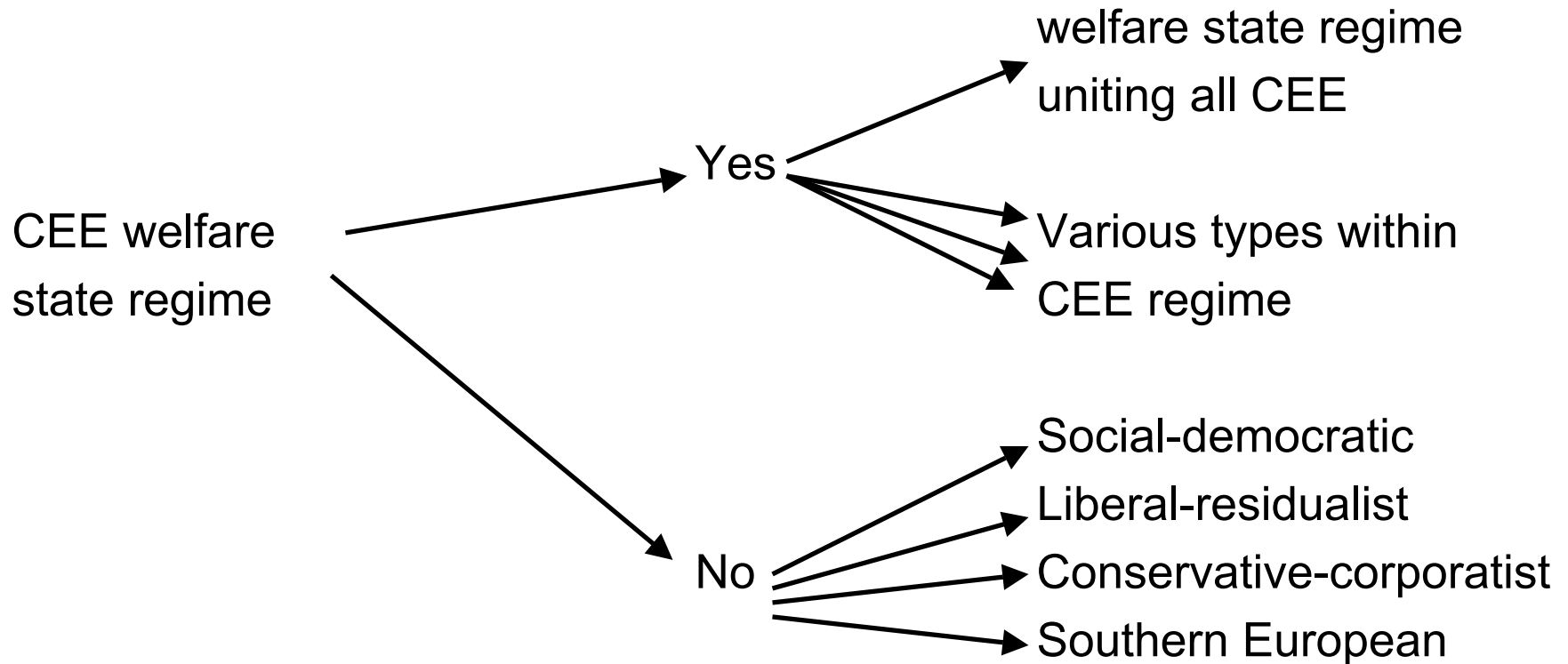
Social welfare state regimes

Welfare state regimes	Ex.	Characteristics
Liberal-residualist (Esping-Andersen 1990)	UK, US	- Market solutions have priority - residual social protection
Social-democratic (Esping-Andersen 1990)	S, DK, FIN, N	- State solutions have priority - comprehensive social protection
Conservative-corporatist (Esping-Andersen 1990)	GER, FRA	- Family solutions have priority - social protection linked to status
Southern European (Ferrara 1996)	ITA, SP, GR, P	- Family solutions have priority - residual social protection
Eastern European (Deacon et al. 1992)	PL, CZ, HU	- From state to family, NGOs? - residual social protection





Welfare state regimes in Central + Eastern Europe





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3. The OIA/HtA Study – Objectives

- Commissioned by 'Help the Aged' – research carried out by Oxford Institute of Ageing in 2006
 - Point of departure: strong correlation between poverty/social exclusion and old age in Britain (for example, Gordon & Townsend 2000; Ogg 2005) ⇒ concern older people's org.
1. To evaluate social inclusion policies for older people in other EU member states
 2. To identify examples of good practice for social inclusion of older people in Europe





3. The OIA/HtA Study – Hypothesis+methodology

- **Central hypothesis (path dependency hypothesis):**
Social inclusion strategies reflect sectoral division of labour (market, state, family) typical of the 5 welfare state regimes.

Methods

- Review of policy + legal documents in 24 EU member states
- Expert interviews in 24 EU member states (except UK)
- Experts representing central government, older people's organisations + independent experts
- Qualitative telephone interviews using topic-guide
- Tape-recorded + transcribed
- Duration 30-45 min





4. Social exclusion of older Europeans

- Existence of public debate on social exclusion correlates with high prevalence – CY, GR, POR, IRL (exception FIN!)
- Main risk factors:
 - Lack of family ties (universal)
 - Low income (universal)
 - Living in rural area (universal)
 - Immigration background (universal)
 - Poor access to social services, social care (CEE, IRE)
 - Poor housing conditions (CEE)
 - Early exit from labour market (CEE, NL)
 - No internet access (CEE, FIN)





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5. National social inclusion strategies: Pensions

- Minimum pension is most common national inclusion
 - Germany introduced means-tested basic pension instead
 - Scandinavians (basic) pension based on citizenship
 - **Nothing at all in Lithuania!**
- Survivor's pension also means of social inclusion
 - Widows particularly affected by income loss
 - BUT: eligibility subject to certain conditions
 - Minimum duration of marriage (e.g. BEL, GER, DK)
 - Minimum age (most countries; 45 in BEL – retirement CZ)
 - Not employed (BEL, EST)
 - Caring responsibility for dependent children (most countries)
 - Dependent children may also qualify (9 countries)
 - Sometimes also other members of kin
 - **EST & SLO allow brothers+sisters, grandchildren, and parents!**





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5. Regional social inclusion strategies

- Most common example: Collaboration between regional governments + regional older people's campaigning groups (particularly in IRL, South, CEE)
- Regional advocacy networks
 - „Parliament for the elderly“
- Transport services, particularly in rural areas
- Free telephone advice hotline
- „Adopt an older person“ (widows) in rural areas (AUT)





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5. Local social inclusion strategies

- Local community centres as ‚social clubs for the elderly‘ is most common local social inclusion strategy (universal, but particularly common in CEE & South)
 - Often including day care facilities
 - Sometimes linked to health care + social services (CY, GR)
- Alternatively: Visiting service for older people (Scand. + NL)
- Intergenerational meeting opportunities
 - „Adopt a granny!“ (PL, SP, AUT)
 - Matching lone parents with older people (PL)
 - ‚Homeshare‘ (SP, AUT, UK)
- Sheltered housing (universal)





6. Path dependency of social inclusion strategies

- **Central hypothesis (path dependency hypothesis):**
Social inclusion strategies reflect sectoral division of labour (market, state, family) typical of the 5 welfare state regimes.
 - ⇒ **overall rejected** – social inclusion strategies addressing universal problems, independent of welfare state context (lack of family ties; low income; living in rural area)
 - ⇒ **BUT** some indication of path dependency:
 - particular emphasis of pension system in conservative-corp. (SI)
 - particular emphasis on intergenerational in Catholic
 - particular emphasis on community centres in south + CEE





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Thank you very much for your attention!

