

ROSEnet COST ACTION (CA 15122)

REDUCING OLD-AGE SOCIAL EXCLUSION:
COLLABORATIONS IN RESEARCH & POLICY

Old-Age Social Exclusion: Critical Gaps in Research and Policy

Opening conference of COST Action CA 15122

Reducing Old-Age Exclusion in Europe:

Collaborations in Research and Policy - ROSEnet

Institute for Lifecourse & Society,
National University of Ireland Galway,
Galway, Ireland

October 28th 2016

Conference Proceedings

Conference Programme

9.00 - 9.10

Welcome Address

John McHale, Dean, College of Business, Public Policy, and Law, NUI Galway, and
Chairman of the Irish Fiscal Advisory Council.

9.10 - 9.40

ROSEnet: Collaborations in Research and Policy

Kieran Walsh, Chair, ROSEnet

Irish Centre for Social Gerontology, National University of Ireland Galway, Ireland

Contemporary Perspectives on Old-Age Exclusion in Europe and Beyond

Session Chair: Charles Waldegrave, Family Centre Social Policy Research Unit, New Zealand

9.40 - 10.05

Economic Aspects of Exclusion

Ageing and economic exclusion: measures and indicators

Michal Myck, Centre for Economic Analysis (CenEA), Poland

Jim Ogg, Ageing Research Unit, Caisse nationale d'assurance, France

10.05 - 10.30

Social Relations Aspects of Exclusion

A Conceptualisation of Exclusion from Social Resources and Future Research Goals: Potentials and Limitations

Marja Aartsen, NOVA Centre for Welfare and Labour Research, Norway

Vanessa Burholt, Centre for Innovative Ageing, Swansea University, UK

10.30 - 10.50

Coffee

Session Chair: Felciano Villar, University of Barcelona, Spain

10.50 - 11.15

Service Aspects of Exclusion

Old-Age Exclusion from Services in Europe: Global Trends, Gender and Ethical Challenges, Local Perspectives

Veerle Draulans, Centre for Sociological Research, KU Leuven, Belgium

Giovanni Lamura, INRCA, National Institute of Health & Science on Ageing, Italy

Iuliana Pecupetu, Research Institute for Quality of Life, Romania

11.15 - 11.40 Community and Spatial Aspects of Exclusion
Quantifying Age-Friendliness
Lucie Vidovičová, Office for Population Studies, Masaryk University, Czech Republic

11.40 - 12.05 Civic Rights Aspects of Exclusion
Social exclusion: The Lenses that Migration and Abuse Offer
Ariela Lowenstein, Max Stern Yezreel Valley Academic College, Israel
Sandra Torres, Uppsala University, Sweden

12.05 - 12.30 **Rapporteur: Intersections of Ageing and Exclusion**
Thomas Scharf, Vice-chair, ROSEnet
Newcastle University Institute for Ageing, Newcastle University, UK

12.30 - 13.30 Lunch

New Directions in Policy Development

13.30 - 13.45 **Ageing, Social Exclusion and Policy in a Global Context**
Discussant and panel chair, Jeni Warburton
John Richards Initiative, La Trobe University, Australia

13.45 - 14.45 **Respondents & Panel Discussion**
Maciej Kucharczyk, Managing Director, Age-Platform Europe, Brussels
Amanda Grenier, Gilbrea Centre for Studies in Ageing, McMaster University, Canada
Päivi Topo, Director, The Age Institute, Finland
Patricia Conboy, Head of Policy, HelpAge International, UK

14.45 – 15:00 **Closing Address**

Speakers' and Panellists' Biographies



Marja Aartsen

Norwegian Social Research Oslo and Akershus University College of Applied Sciences, Norway

Marja Aartsen is research professor at Norwegian Social Research (NOVA) in Oslo. Her interest is in social functioning of older adults, and the statistical modelling of longitudinal developments in social networks and other forms of social integration in relation to developments in mental, physical and cognitive health. She has a background in Sociology, and did her PhD at the VU University Amsterdam, The Netherlands.



Vanessa Burholt

Director of the Centre for Innovative Ageing; Director of the Centre for Ageing and Dementia Research; Professor of Gerontology Swansea University, Wales, United Kingdom

Vanessa was awarded a personal Chair at Bangor in 2007, and shortly after moved to Swansea University, as Director of the Centre for Innovative Ageing. In 2016, Vanessa was also appointed Director of the pan Wales, [Centre for Ageing and Dementia Research](#). Vanessa holds a public appointment as the research member of the Ministerial Advisory Forum on Ageing and is co-Chair of the research hub of the [Campaign to End Loneliness](#). Vanessa has worked on and led international and national research projects worth approximately £11.3M, and has supervised 23 post-graduate students. Her research interests include loneliness, support networks, intergenerational relationships, social exclusion rurality, migration of older people and attachment to place and she has published over 50 articles and book chapters on these topics.



Patricia Conboy

Head of Policy at HelpAge International

Patricia Conboy is Head of Policy at HelpAge International. Patricia joined HelpAge in 2016. She is responsible for leading, building and supporting our policy team and global policy on ageing and development. With extensive professional experience in the field of age policy, Patricia has held advisory, leadership and management roles with the British Geriatrics Society (2014-16), Older & Bolder (2008-13) and the National Council on Ageing and Older People (2003-2008). She has also been a member of the Oversight Board for The Irish Longitudinal Study on Ageing (TILDA).



Veerle Draulans

Genderstudies - Faculteit Sociale Wetenschappen Centrum voor Sociologisch Onderzoek (CESO), KU Leuven, Belgium

Veerle Draulans took her PhD in 1994 at KU Leuven (Belgium) in Ethics. She combined an appointment at Tilburg University, the Netherlands (master *ethics, care and policy*, master *management of cultural diversity*) with an appointment at KU Leuven. At this moment, she is associate professor genderstudies at KU Leuven, Faculty of Social Sciences, and teaches in an interuniversity *master gender and diversity*.

Her research focuses on ‘diversity and care’, ‘gender and leadership’, ‘gender and STEM’, ‘values and religion in Europe’. She is member of the Belgian Governmental Advisory Committee on Bio-ethics, and the Board of Governors of Emmaus (healthcare and welfare organisations). Veerle.Draulans@kuleuven.be.



Amanda Grenier

Associate Professor in Health, Aging and Society, Gilbrea Chair in Aging and Mental Health, and Director of the Gilbrea Centre for the Study of Aging in McMaster University, Canada

Amanda Grenier is Associate Professor in Health, Aging and Society, Gilbrea Chair in Aging and Mental Health, and Director of the Gilbrea Centre for the Study of Aging in McMaster University.

Amanda's work explores the social constructs of ageing and challenges taken-for-granted assumptions related to late life. Amanda's research focuses on the interface of public policies, organizational practices, and older people's lived experience. Her on-going research interests and projects include: exploring the intersections of aging and homelessness; understanding the contradictions regarding late life, frailty and risk; exploring the degree to which older people's experience 'fit' with expected transitions and age-based models of care.



Maciej Kucharczyk

Policy Director, AGE Platform Europe

Maciej Kucharczyk is Policy Director at AGE Platform Europe – a network of 126 organisations ‘of’ and ‘working for’ people aged 50 and over. Maciej has been working over the last 10 years on issues such as, the adequacy and sustainability of social protection, minimum income, promotion of human rights, social justice and dignity. He is also vice-president of Social Platform, the largest network of European

rights-based NGOs working in the social sector. Graduated in economics at the University of Lodz in Poland, Maciej holds post-graduate degrees in European affairs at the College of Europe and in public administration at the Ecole Nationale d'Administration.



Giovanni Lamura

INRCA (IRCCS) - National Institute of Health & Science on Ageing, Centro Ricerche Economico-Sociali per l'Invecchiamento (Centre for Socio-Economic Research on Ageing), Ancona, Italy

Giovanni Lamura leads the Centre for Socio-Economic Research on Ageing at INRCA (Italy's National Institute of Health and Science on Ageing). He graduated in economics, achieved a PhD in "Life course and social policy" at the University of Bremen (Germany), and was visiting fellow at the University of Hamburg-Eppendorf (Germany) in 2006-2007 and the European Centre for Social Welfare Policy & Research in Vienna (Austria) in 2010-2011. His research interests are focused on international research on family & long-term care; migrant care work; prevention of elder abuse; ICT-based support for informal carers; intergenerational solidarity; interdisciplinary research on ageing.



Michał Myck

Centre for Economic Analysis CenEA, Poland

Michał Myck is Director of the Centre for Economic Analysis in Szczecin (PL). He previously worked at the Institute for Fiscal Studies and at the DIW-Berlin and since 2005 has been the Polish Country Team Leader for the Survey of Health, Ageing and Retirement in Europe (SHARE). He received his B.A. and M.Phil. degrees at the University of Oxford (1997 and 1999), Ph.D. at the University of Warsaw (2006) and habilitation degree at the Freie Universität Berlin (2015). His work has been centred on modelling of labour market behaviour, the relationship between health and employment, measures of material circumstances and the structure of personal taxes and benefits.



Jim Ogg

Ageing Research Unit, Caisse Nationale D'Assurance, France

Jim Ogg is Head of the Ageing Research Unit at the Caisse nationale d'assurance vieillesse (French National Pension Fund), Paris, France. He has a sociological background and has undertaken both quantitative and qualitative research on transitions to retirement, intergenerational relations, and living conditions in later life. He is Deputy Editor of the journal *Ageing & Society* and Editor of the French journal *Retraite et Société*.



Iuliana Precupețu

Research Institute for Quality of life, Romanian Academy, Romania

Dr. Iuliana Percupețu is a senior researcher at the Research Institute for Quality of Life, Romanian Academy. She also has twelve years teaching experience at the Faculty of Sociology and Social Work, University of Bucharest, teaching courses of Methods of social research and Quality of life. Iuliana Precupețu specialises in quality of life, social inequality and social indicators.



Thomas Scharf

Professor of Social Gerontology, Newcastle University, United Kingdom

Thomas Scharf is Professor of Social Gerontology in the Institute of Health & Society and the Institute for Ageing at Newcastle University. He joined Newcastle in 2016, having previously been Director of the Irish Centre for Social Gerontology, NUI Galway.

Tom is a Fellow of the UK Academy of Social Sciences and holds visiting professorships at NUI Galway and Keele University. His research addresses issues relating to social inclusion and exclusion in later life, often with a focus on the spaces and places in which inclusion and exclusion arise and on the policy responses to forms of exclusion (see: <http://www.ncl.ac.uk/ih/people/profile/thomas.scharf>).



Päivi Topo

Director, Adjunct Professor, PhD, The Age Institute, Helsinki, Finland

Päivi Topo is Director of The Age Institute in Helsinki, Finland. The Age Institute is a centre for research and development in applied social gerontology and aims to produce and disseminate knowledge that can be used to promote good ageing and good old age. The Age Institute produces and assists in applying research-based knowledge of ageing, older persons' daily lives and services for older adult policy and practice. In her role as Director, Päivi supports the implementation of new knowledge, in the areas of physical exercise, functional capacity

and health and inclusion and mental well-being.



Sandra Torres

Professor of Sociology & Chair in Social Gerontology, Uppsala University, Sweden

Prof Torres' research problematizes old age-related constructs; sheds critical light on commonly used methods in health and social care and deconstructs some of the taken for granted assumptions that guide policy and practice. As such, her work aims to expand the social gerontological imagination through the use of knowledge gathered in the sociology of ethnicity/ migration, social work and the caring

sciences. Her latest books are edited collections published by Routledge in 2016: *Ageing in Contexts of Migration* (co-edited with Ute Karl) and *Older People and Migration: Challenges for Social Work* (co-edited with Sue Lawrence).



Lucie Vidovičová

Office for Population Studies, Masaryk University, Czech Republic

Dr. Lucie Vidovičová, PhD. is a sociologist. Her long-term research interests include the sociology of ageing, age discrimination, active ageing, and social exclusion. She is also involved in research projects in the field of gender and the labour market, lifelong learning, family, environmental gerontology, and social policy. She conducts research for national as well as European bodies and works as a consultant on a number of implementation projects. Recent projects she has been involved in include surveys of the labour market conditions of older workers and their impact on retirement decisions (DetREU), MOPACT, and those on older consumers, age discrimination, ageing in big cities, ageing in rural areas, and the issue of role overload in active ageing grandparents.



Kieran Walsh

Acting Director, Irish Centre for Social Gerontology; Director, Project Lifecourse, Institute for Lifecourse and Society

Dr. Kieran Walsh is Acting Director of the Irish Centre for Social Gerontology, and Project Director of Project Lifecourse at the Institute for Lifecourse and Society in NUI Galway, and is Chair of COST Action CA15122 on 'Reducing Old-Age Social Exclusion' (ROSEnet). Kieran has extensive experience in interdisciplinary social gerontology and life-course research. His research interest and expertise focus on: social exclusion in later life; place and life-course transitions and trajectories; the influence of structural forces and institutional life course; informal and formal infrastructures of care, and care relationships; and intersecting ageing and migration processes.



Jeni Warburton

John Richards Chair of Rural Aged Care Research, John Richards Initiative, Albury-Wodonga, Australia

Jeni Warburton is the John Richards Chair in Rural Aged Care Research at La Trobe University in Wodonga, Victoria, Australia. Jeni has 20 years' experience of research into social policy, particularly relating to issues associated with an ageing population. Her main areas of expertise are in healthy and productive ageing; as well as volunteering and community, with her current research focusing on ageing in rural communities. Jeni has published widely both nationally and internationally on these topics, and her research has played a key role in the development of practice and policy around volunteering and social inclusion for older people.

Paper Abstracts

ROSEnet: Collaborations in Research and Policy

Kieran Walsh, Chair, ROSEnet

Irish Centre for Social Gerontology, National University of Ireland Galway, Ireland

While older adults are disproportionately affected by multiple forms of exclusion, research and policy concentrate on those of working age, those with low-income, and children. The lack of consensus in Europe as to older adult experiences during the economic crisis has marginalised concerns for old-age disadvantage even further. Social exclusion has emerged redefined from this period as a policy that almost explicitly does not consider later life. The concept of social exclusion itself has considerable potential to explain and respond to disadvantage in later life globally. However, in the context of ageing populations the construct remains ambiguous, and questions about what, if anything, makes old-age exclusion unique as a form of disadvantage, and specific to ageing, still remain. Compounded by scientific knowledge gaps, reducing old-age social exclusion therefore represents a significant global challenge. With current efforts lacking direction and impact and with consequences for individuals, families and social systems, old-age exclusion also represents a substantial barrier to realising positive outcomes in global ageing and health. It is within this context that the ROSEnet (Reducing Old-Age Social Exclusion in Europe) COST Action aims to overcome fragmentation and critical gaps in conceptual innovation on old-age exclusion across the life course, in order to address the research-policy disconnect and tackle social exclusion amongst older people in Europe.

Ageing and economic exclusion: measures and indicators

Michal Myck, Centre for Economic Analysis (CenEA), Poland

Jim Ogg, Ageing Research Unit, Caisse nationale d'assurance, France

Intergenerational coresidence can be associated with precarious circumstances, such as an adult child who is supported by an older parent, an older parent living in the household of an adult child, or the two generations living together and supporting each other. The French Family and Housing survey that was linked to the 2011 census is used to explore how multi-generational households are organised. The results confirm that this type of household continues to exist and should be considered other than a form of living arrangement that is destined to disappear. Approximately 8% of individuals aged 30 years and above with a parent alive coreside with a parent, representing 1.8 million individuals. Overall, coresidence is associated more with men, individuals not in a couple, childlessness, unemployment or inactivity, crowded housing with poor amenities, and poor urban areas where the monthly income is below the average. Sharing a household can be considered as a family response to life course hazards. Adults living with their parents are more likely to be men with low resources, whereas women who have comfortable housing conditions are associated with living conditions where a parent is supported by an adult child.

A Conceptualisation of Exclusion from Social Resources and Future Research Goals: Potentials and Limitations

Marja Aartsen, NOVA Centre for Welfare and Labour Research, Norway

Vanessa Burholt, Centre for Innovative Ageing, Swansea University, UK

This presentation provides a description of our working group's first draft of a conceptual model of exclusion from social relations. We attempt to draw upon, extend and unite multidisciplinary research to develop a novel, comprehensive and dynamic conceptual model. The model will help researchers grapple with complex thinking, and see persistent problems in a new light providing breakthroughs in our understanding of the feedback loops between psycho-social, cultural and physical environments, and genetics involved in the interrelationship between the risks for exclusion from social relations and outcomes including loneliness, quality of life, life satisfaction, social opportunities, social cohesion, health and functioning. This presentation is framed within a critical human ecological framework. From the critical human ecology perspective, the environment, the social interactions therein and the biological manifestation of the body are interconnected in an active process of mutual influence and change. There is much empirical evidence for bivariate associations between the elements of the model from various disciplines, but research has not often crossed the traditional boundaries of disciplinary perspectives. Our working group will use the conceptual model to guide our future multidisciplinary work, for example, in developing cross-national articles, collaborative research and collaboration with stakeholders.

Old-Age Exclusion from Services in Europe: Global Trends, Gender and Ethical Challenges, Local Perspectives

Veerle Draulans, Centre for Sociological Research, KU Leuven, Belgium

Giovanni Lamura, INRCA, National Institute of Health & Science on Ageing, Italy

This presentation aimed at providing a three-voice of following aspects: first, a brief illustration of some basic trends taking place across Europe in the area of old-age exclusion from services, followed by some reflections on related gender and diversity challenges, to conclude with the local perspective, based on the Romanian case. After a brief introduction on the definition of the area's terminological boundaries, comparative data were shown on the difficulties reported by over 65-year-old EU-citizens in accessing different kinds of services (public transportation, postal and banking services, health care). These data were integrated by analyses concerning the impact of the digital revolution on service accessibility in older age and the rural-urban divide, as well as which service characteristics are most important in users' eyes to prevent exclusion. The second section of the presentation addressed the gender and diversity challenge, underlining the importance of keeping a diversity-sensitive approach in organising and delivering services. This was accomplished by focussing in particular on gender and migration background related aspects, based on empirical data reflecting the Belgian situation. The presentation closed by reporting five major challenges affecting the Romanian context. These include old-age high vulnerability of the Romanian population; the relatively low level of public spending characterising Romania's LTC, due to a lack of vision in this area, not surprisingly related also to a high reliance on informal care provision; and the strong impact of outbound migration, which has heavily affected the care staff availability in the country.

Quantifying Age-Friendliness

Lucie Vidovičová, Office for Population Studies, Masaryk University, Czech Republic

As some argue, place is both a collection of physical features – the buildings, streets, monuments, and open spaces at a certain geographical location – and actors' interpretations of these features. Place is therefore a socio-spatial phenomenon which can shape older adults' lives in both positive and negative ways. Places can be "age-friendly", but also selected features of both urbanisation and rural transformation can bring exclusion and deprivation, disadvantaged neighbourhoods, and issues with safety and feelings of belonging, etc.

In order to minimize these negative aspects of places in later life, the push to develop strategies, practices, services, products, and processes that will reflect the specific needs of ageing people and help to improve their quality of life is increasing at all levels of government. In our paper, we propose a survey tool for the easy quantification of the level of age friendliness of urban areas, which could be used to rank cities and towns for benchmarking purposes. Our results show that older people living in cities with more intensely perceived age-friendly features also express higher levels of general satisfaction, more "feels like home" feelings, and higher levels of happiness. They also feel less lonely and more often engage in social activities, such as visiting friends and engaging in leisure activities etc. We propose that this multidimensional measure could be used as a means of assessing the need for action against spatially (or community/ neighbourhood) driven social exclusion in later life.

Social exclusion: The Lenses that Migration and Abuse Offer

Sandra Torres, Uppsala University, Sweden

Ariela Lowenstein, Max Stern Yezreel Valley Academic College, Israel

The globalization of international migration is increasing the ethno-cultural diversity of aging populations across Europe and has put new phenomenon on the agenda of elderly care planners and providers (such as, for example, migrant care workers and the formulation of diversity-aware policies and practices). As such, this is a phenomenon to reckon with when discussions on exclusion in old age take place. The way in which scholars of aging and old age conceptualize exclusion is namely a bit different than the way in which migration scholars regard this construct. This lecture aims therefore to introduce the audience at the COST conference in Galway to the two lenses on social exclusion that must be taken into account when discussing older migrants: the debate on exclusion as it has been carried out within social gerontology and the debate on exclusion as it has been carried out within migration scholarship. The lecture will offer glimpses at what these different approaches to social exclusion offer an ongoing study of the challenges that increased ethno-cultural diversity poses to need assessment practice (based on focus group interviews with care managers and content analysis of their case files) and would argue that these different approaches offer different solutions to the question of exclusion in old age. This lecture aims to open up a dialogue about how research, policy and practice about aging, old age and elderly care can be developed in these globalized times. The lecture will ultimately argue that much could be gained if the gerontological imagination on social exclusion were to seriously engage with migration scholars' conceptualizations of what social exclusion means and how it can be addressed.

Rapporteur: Intersections of Ageing and Exclusion

Thomas Scharf, Vice-chair, ROSEnet

Newcastle University Institute for Ageing, Newcastle University, UK

This paper seeks to situate current understandings of ageing and social exclusion within a broader historical and policy frame. Charting the development of gerontological research on multidimensional exclusion, the paper highlights evolving considerations arising from work conducted since the late 1990s. This body of knowledge was influential in exploring the relevance of different dimensions of exclusion in later life, showing which groups were most at risk of exclusion, and charting drivers of exclusion over the life course. More recently, attention has focused on taking stock of the state-of-the-art knowledge on exclusion in later life, challenging assumptions about conceptual models of inclusion/exclusion, and reviewing research on dimensions of exclusion. Against this background, the paper considers the ways in which different dimensions of exclusion intersect, creating multiple risks of exclusion for particular groups in later life and for those approaching older age. The paper concludes by addressing potential policy responses arising from the latest research evidence on ageing and social exclusion.