



FUTURAGE

A ROAD MAP *for* AGEING RESEARCH



Essential Elements of the Road Map: Social and Economic Resources

Giovanni Lamura, Carlos Chiatti & Francesco Barbabella
(INRCA, Italian National Research Centre on Ageing, Italy)

Stakeholders Meeting
Brussels, 11th May 2010

Contents

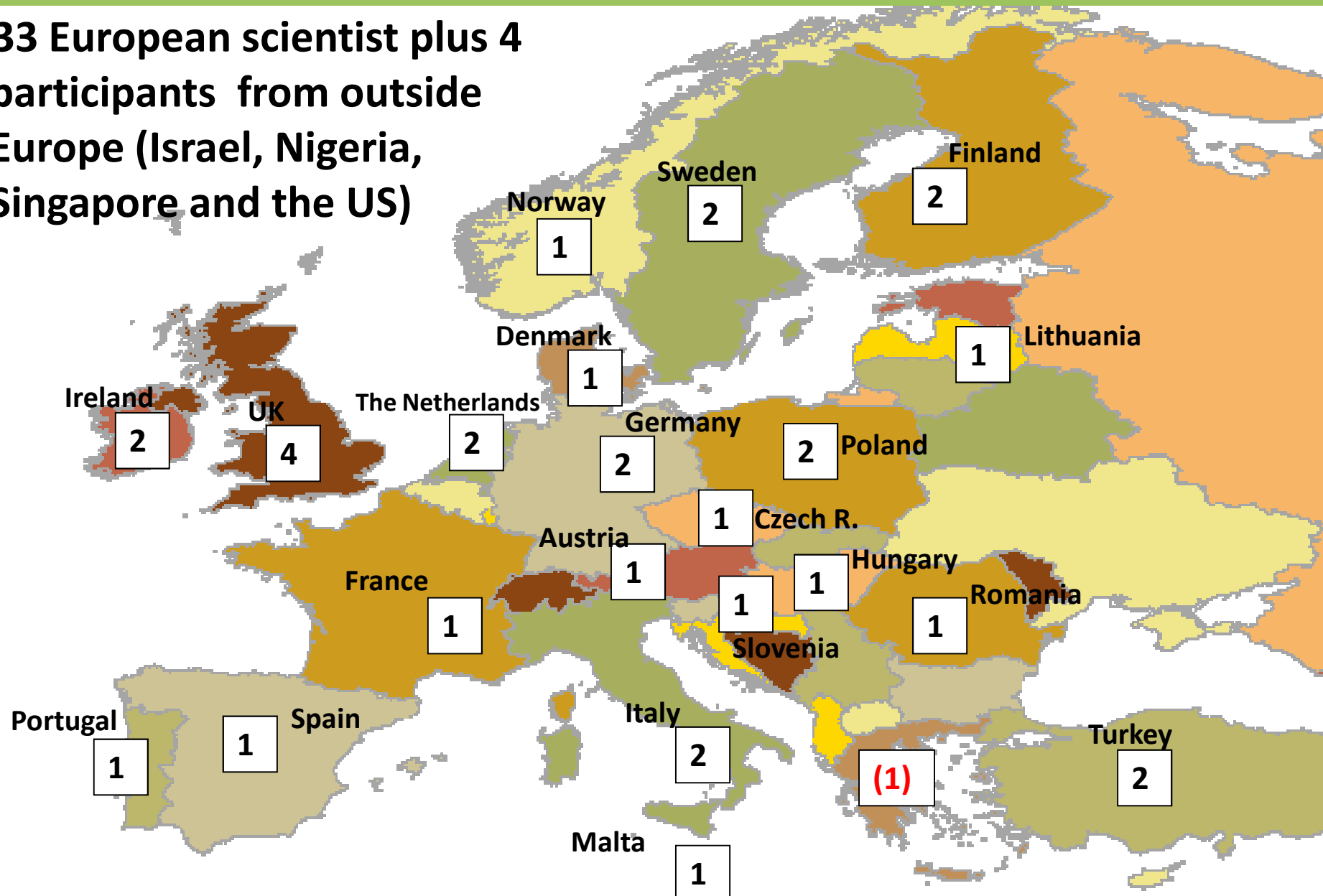
- 1. Conceptual approach and organisation of the 1st round of consultations on socio-economic resources**
- 2. Outputs of 1st round & their relevance for research and policy in Europe's ageing societies:**
 - **older age and caregiving**
 - **older age and frailty**
 - **active ageing**
 - **socio-economic needs in older age**

1. Approach and organisation (1/4)

- based on National Consultations at country level
- workshop held on 25th – 26th February at INRCA, Italy
- attended by 37 scientists from 25 countries (21 EU)

Participants by country

33 European scientist plus 4 participants from outside Europe (Israel, Nigeria, Singapore and the US)



Main characteristics of participants

Different disciplines:

- economics
- ethnicity and ageing
- gerontology
- geriatrics
- medicine
- political sciences
- psychology
- psycho-gerontology
- social gerontology
- social work
- sociology

Gender balance: 60% female

Different professional and life course stages:

- post-doctoral students
- mid-career researchers
- established scientists

1. Approach and organisation (2/4)

- based on National Consultations at country level
- workshop held on 25th – 26th February at INRCA, Italy
- attended by 37 scientists from 25 countries (21 EU)
- **participants were grouped according to four main thematic areas / topics**

Conceptual matrix of thematic areas

<div style="text-align: right;"><i>Perspective</i></div> <div style="text-align: left;"><i>Area</i></div>	Older people as a “socio-economic” resource for society (OP for society)	Older people as users/recipients of socio-economic resources (Society for OP)
Care	<u>1: Older people as caregivers</u>	<u>2: Dependent older people</u>
Other socio-economic areas	<u>3: OP as socio-economic resource (active ageing)</u>	<u>4: Socio-economic needs of older people</u>

1. Approach and organisation (3/4)

- based on National Consultations at country level
- workshop held on 25th – 26th February at INRCA, Italy
- attended by 37 scientists from 25 countries (21 EU)
- participants were grouped according to four main thematic areas
- **working groups identified following main topics:**

2. Outputs of Working Group 1

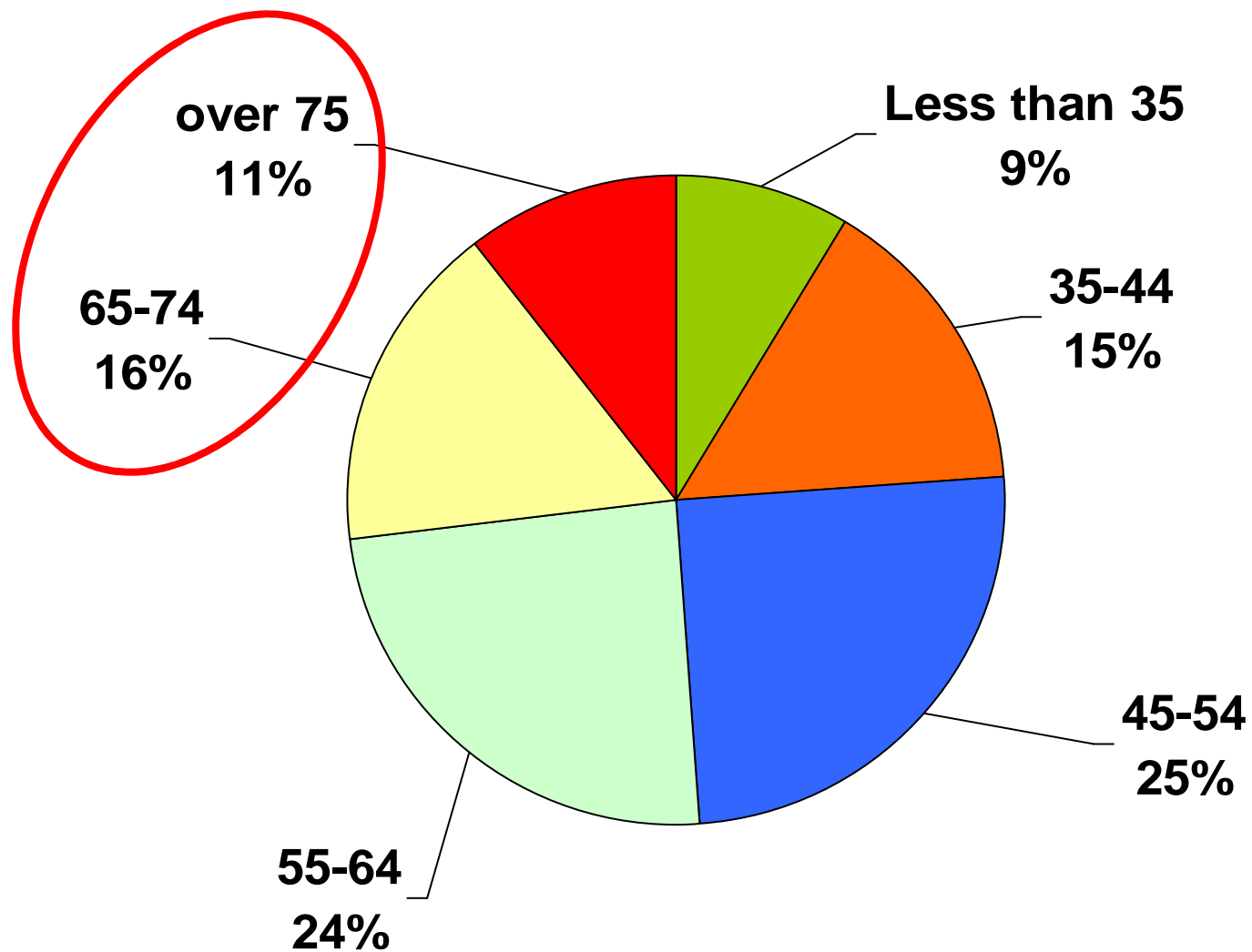
<i>Perspective</i> <i>Area</i>	Older people as a “socio-economic” resource for society (OP for society)	Older people as users/recipients of socio-economic resources (Society for OP)
Care	<p style="text-align: center;"><u>Working Group 1:</u> <u>Older people as caregivers</u></p>	<p style="text-align: center;"><u>Working Group 2:</u> <u>Dependent older people</u></p>
Other socio-economic areas	<p style="text-align: center;"><u>Working Group 3: OP as social and economic resource</u></p>	<p style="text-align: center;"><u>Working Group 4: Socio-economic needs of older people</u></p>

2. Outputs of Working Group 1

Working Group 1: Older people as caregivers

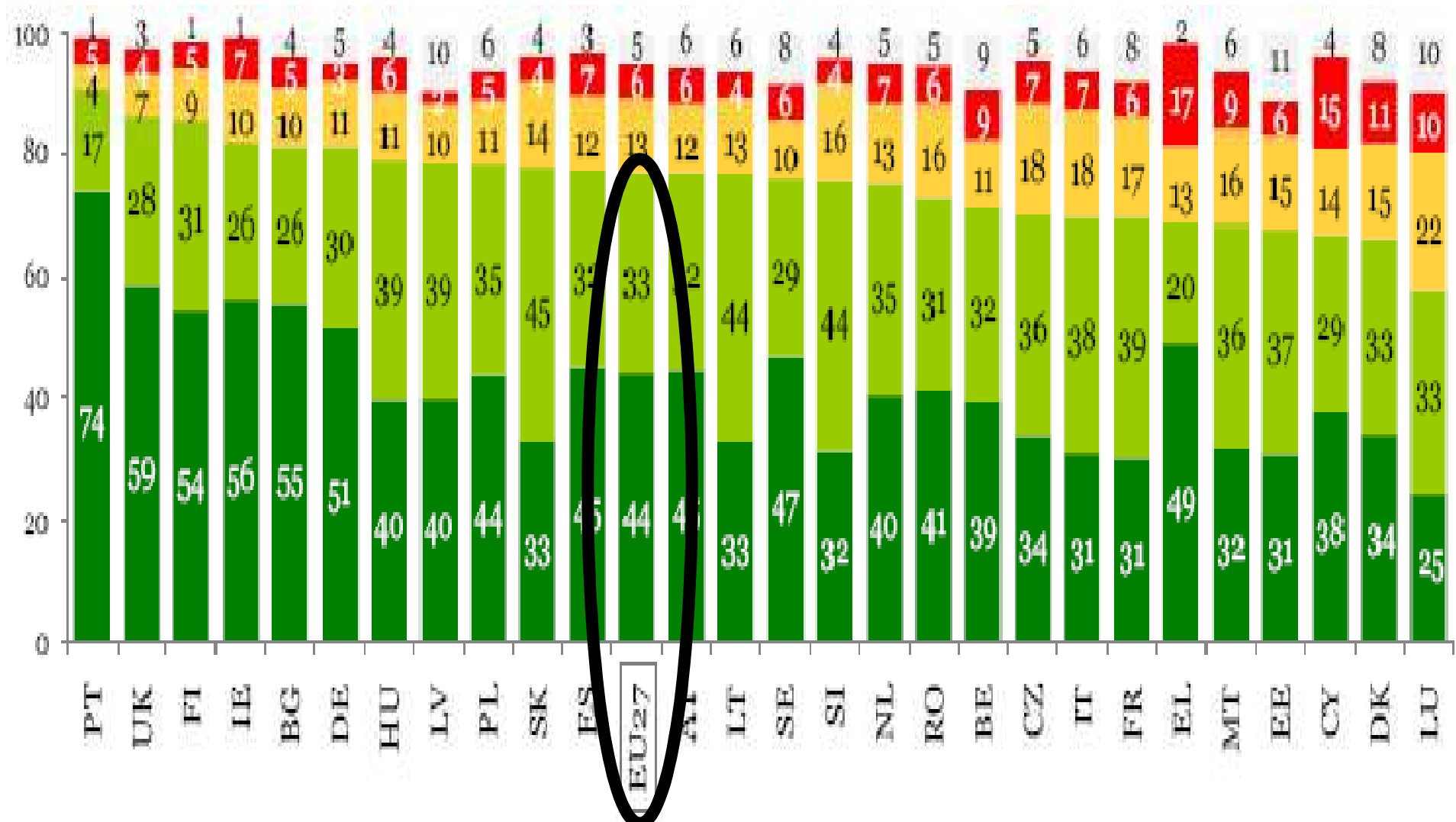
- **Who cares:** care arrangements in relation to gender, cohort and life course; interaction between informal and professional care; focus on carers' resources;
- **Reasons for caring:** impact of new family settings and new patterns of solidarity and individualism on motivations to care; impact of migration of migrant workers;
- **Contents of provided care:** instrumental elements involved (e.g. mental, physical, medical etc.); cultural perceptions about time and quality of care;
- **Policies for care:** incentives for involving older people in informal care, also beyond their own family; preferences vs. moral/normative obligations; measures/services to improve reconciliation between paid work and care.

Caregivers of older people by age group (Eurofamcare data)

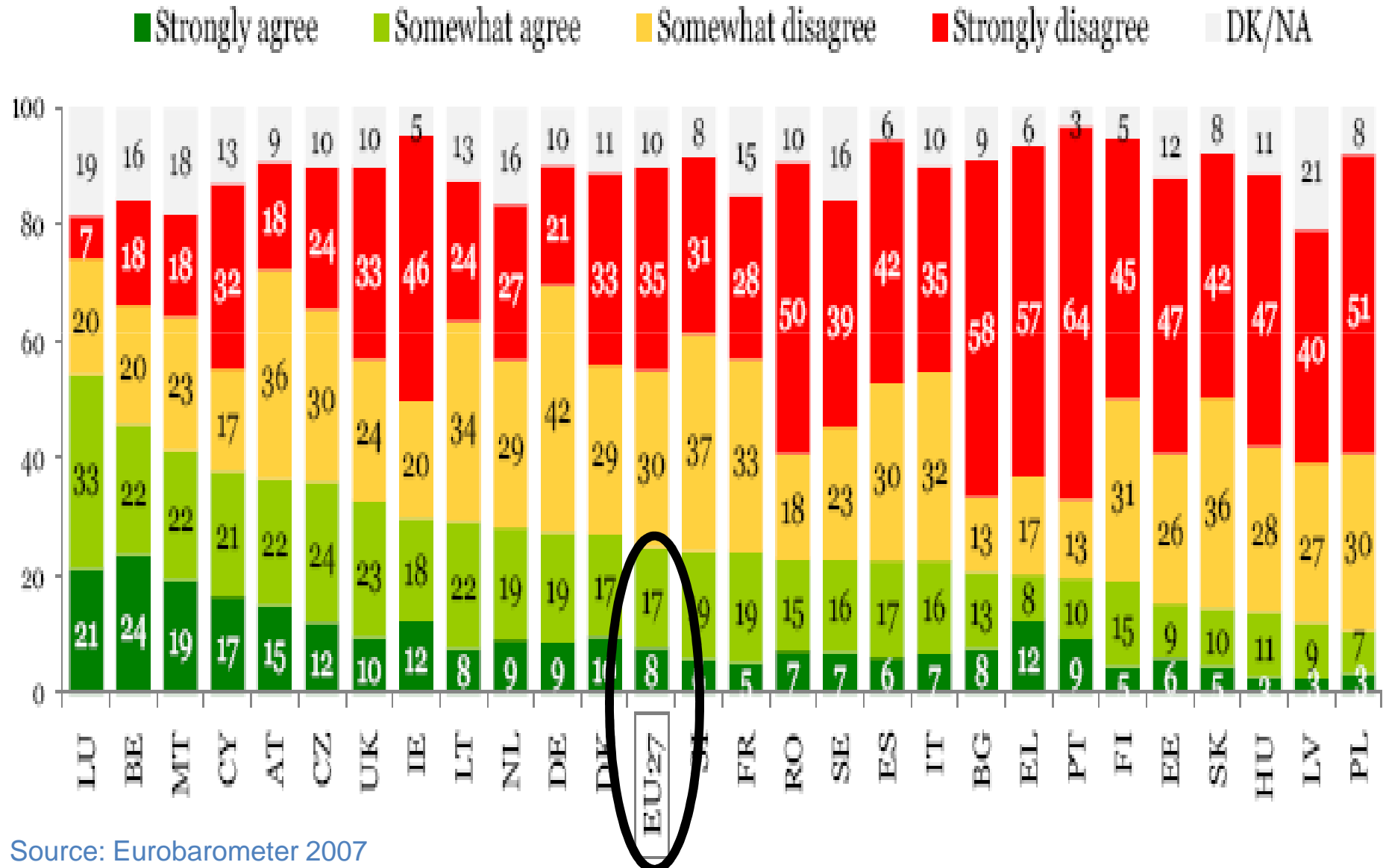


The contribution of older people who care for family or other relatives is not appreciated enough in [our country]

■ Strongly agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ DK/NA



People who have to care for older family members at home receive good support from social services



Source: Eurobarometer 2007

2. Outputs of Working Group 2

<i>Perspective</i> <i>Area</i>	Older people as a “socio-economic” resource for society (OP for society)	Older people as users/recipients of socio-economic resources (Society for OP)
Care	<u>Working Group 1: Older people as caregivers</u>	<u>Working Group 2: Dependent older people</u>
Other socio-economic areas	<u>Working Group 3: OP as social and economic resource</u>	<u>Working Group 4: Socio-economic needs of older people</u>

2. Outputs of Working Group 2

Working Group 2: Dependent older people

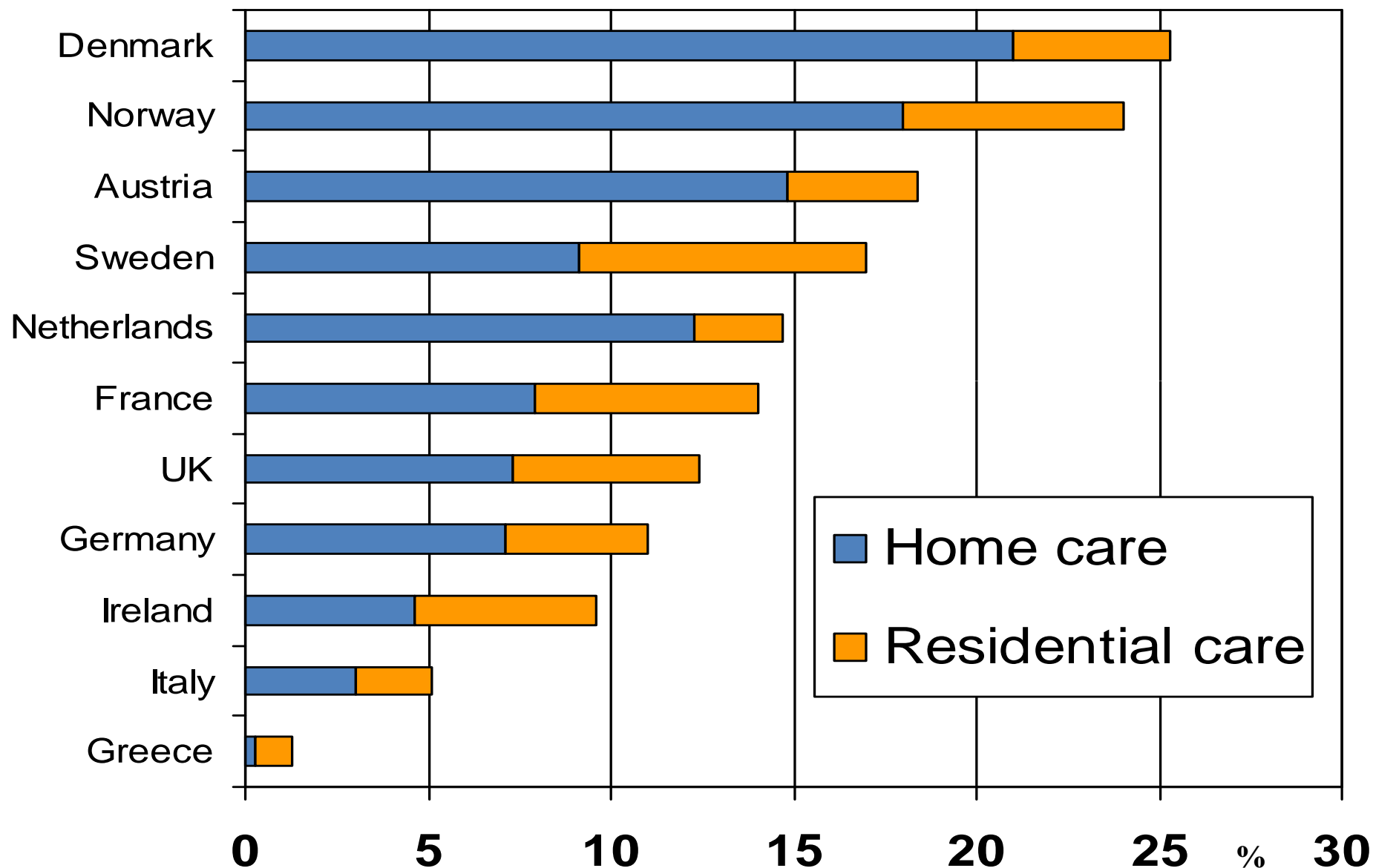
Dependency and independence

- Understandings of dependency and independence from two different perspectives: a) considering different stakeholders and their heterogeneity; b) considering welfare regimes and the underlying socio-cultural values;
- Older people's experiences of "dependency and independence", taking into account cross-cutting factors (class, education, income, gender, ethnicity, disability etc.).

Home and residential care

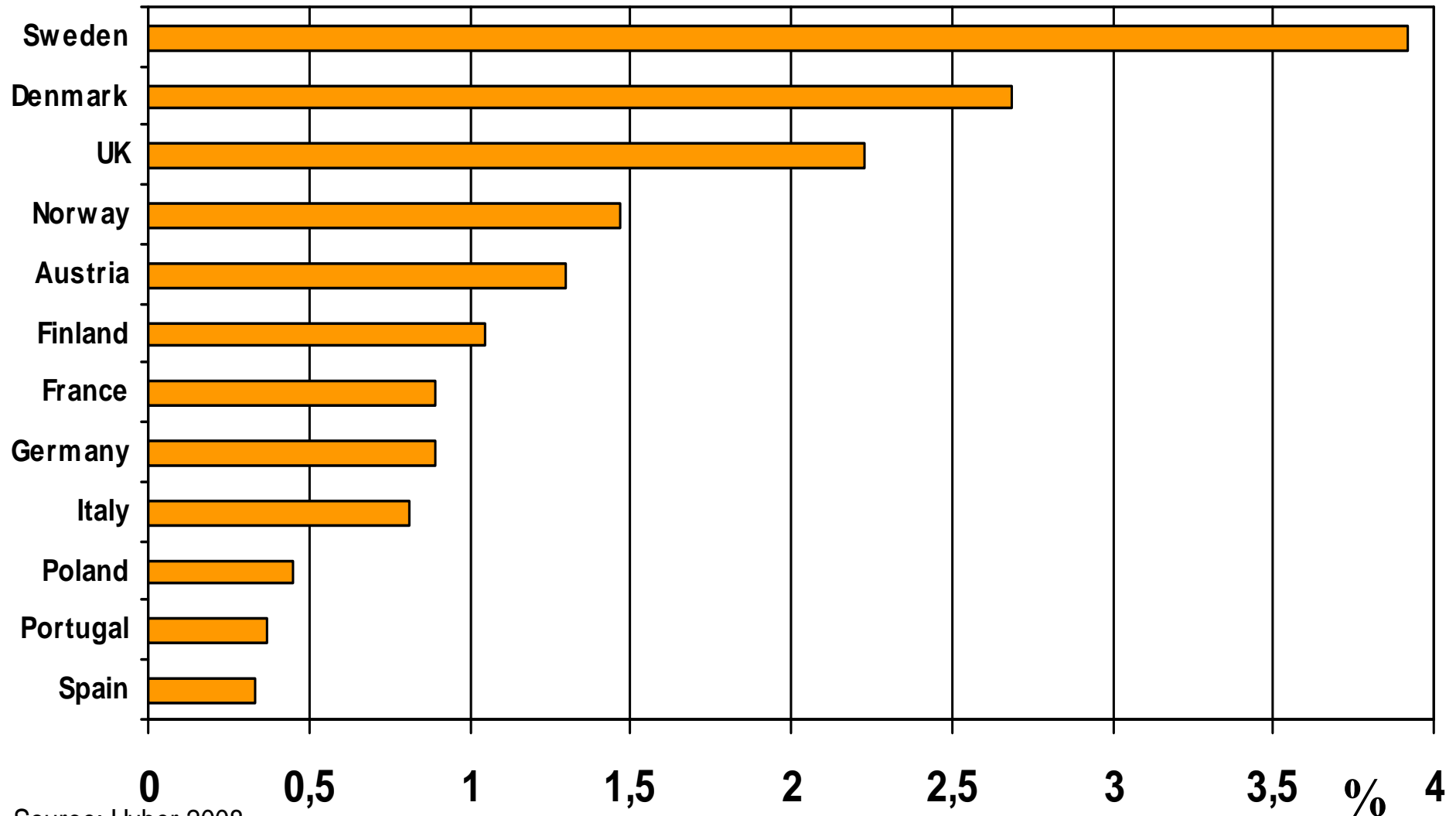
- Analysis of different stakeholders' perspectives (older people, their families, health and social care providers); standards for good quality of care; role of civic society;
- Impact of cross-cutting factors: social policies and welfare regimes, impact of income & housing (structural factors), role of formal-informal care mix.

Older people receiving residential & home care (%)



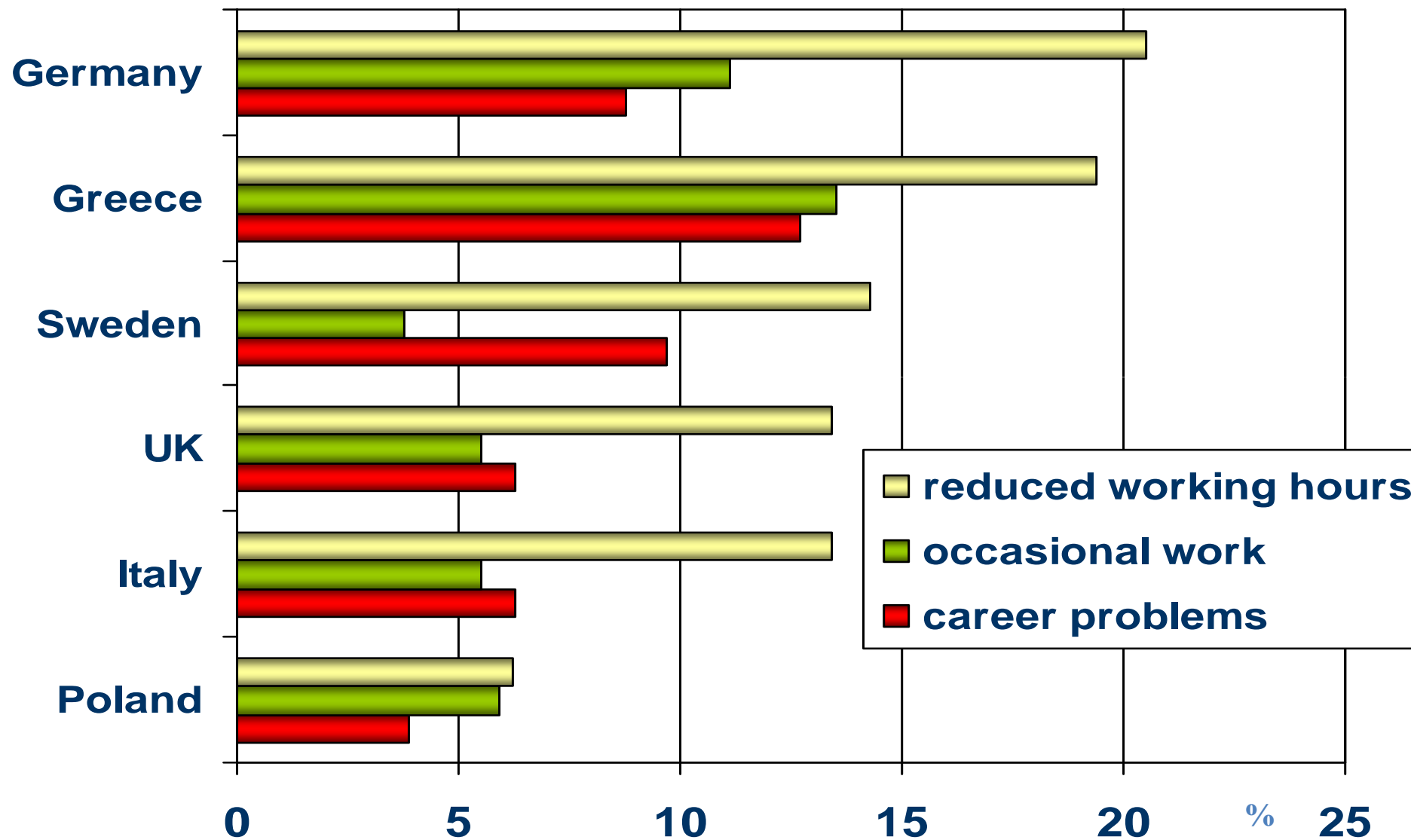
Source: OECD 2005; Pesaresi & Gori 2005; OECD Health Data 2006

Public LTC expenditure (% of GDP, 2005)

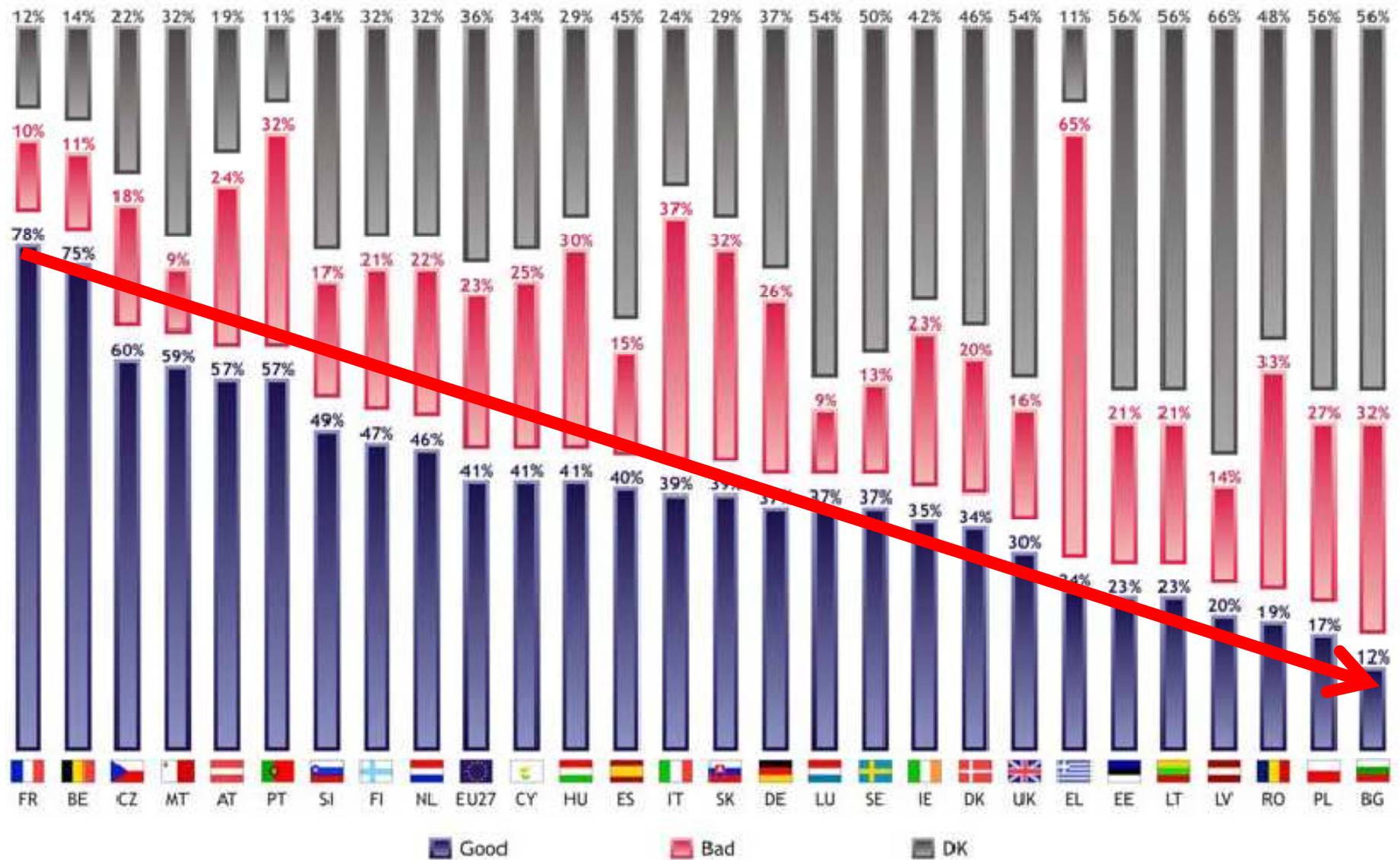


Source: Huber 2008

Restrictions reported by employed carers (%)



How is the quality of nursing homes?



Source: Special Eurobarometer 2007

Who are the people most likely to carry out mistreatment, neglect or even abuse of the elderly? (% on EU-27)



Employment of migrant care workers in elder care

- **Greece:** 26% of migrants (but 80% of women!) are employed in personal care/household services (2007);
- **Italy:** 13% of households caring for older people employ privately migrant care workers (Lamura et al. 2008);
- **Spain:** permits for domestic work to foreigners raised from 33.000 in 1999 to almost 230.000 in 2006;
- **Turkey:** “it has almost become normal to employ Moldovan [& Bulgarian] domestic workers in private households” (Kaska 2006 in Suter 2008);
- **Israel:** “One-third of migrant workers in Israel are women, mostly employed in 24h home care industry” (Kruger 2005)
- **Austria:** two thirds of home care workers have a migration background (Wiener Institut für Sozialpolitik, 2008)
- **UK:** 16% of home carers are foreign-born (Rawles 2008);

2. Outputs of Working Group 3

<i>Perspective</i> <i>Area</i>	Older people as a “socio-economic” resource for society (OP for society)	Older people as users/recipients of socio-economic resources (Society for OP)
Care	<u>Working Group 1: Older people as caregivers</u>	<u>Working Group 2: Dependent older people</u>
Other socio-economic areas	<u>Working Group 3: OP as social and economic resource</u>	<u>Working Group 4: Socio-economic needs of older people</u>

2. Outputs of Working Group 3

Working Group 3: OP as social and economic resource

Prerequisites for older people to be a socio-economic “resource”:

- Supportive environments and transportation; “age-friendly” cities and urban design;
- Health, abilities and ergonomics to balance a lack of them;
- Sufficient money and wealth;
- Lifelong learning & teaching; third age universities; role of media for education.

Main activities of older people as a socio-economic “resource”:

- Activities in the labour market, within the family and as volunteers;
- Learning/teaching and active citizenship.

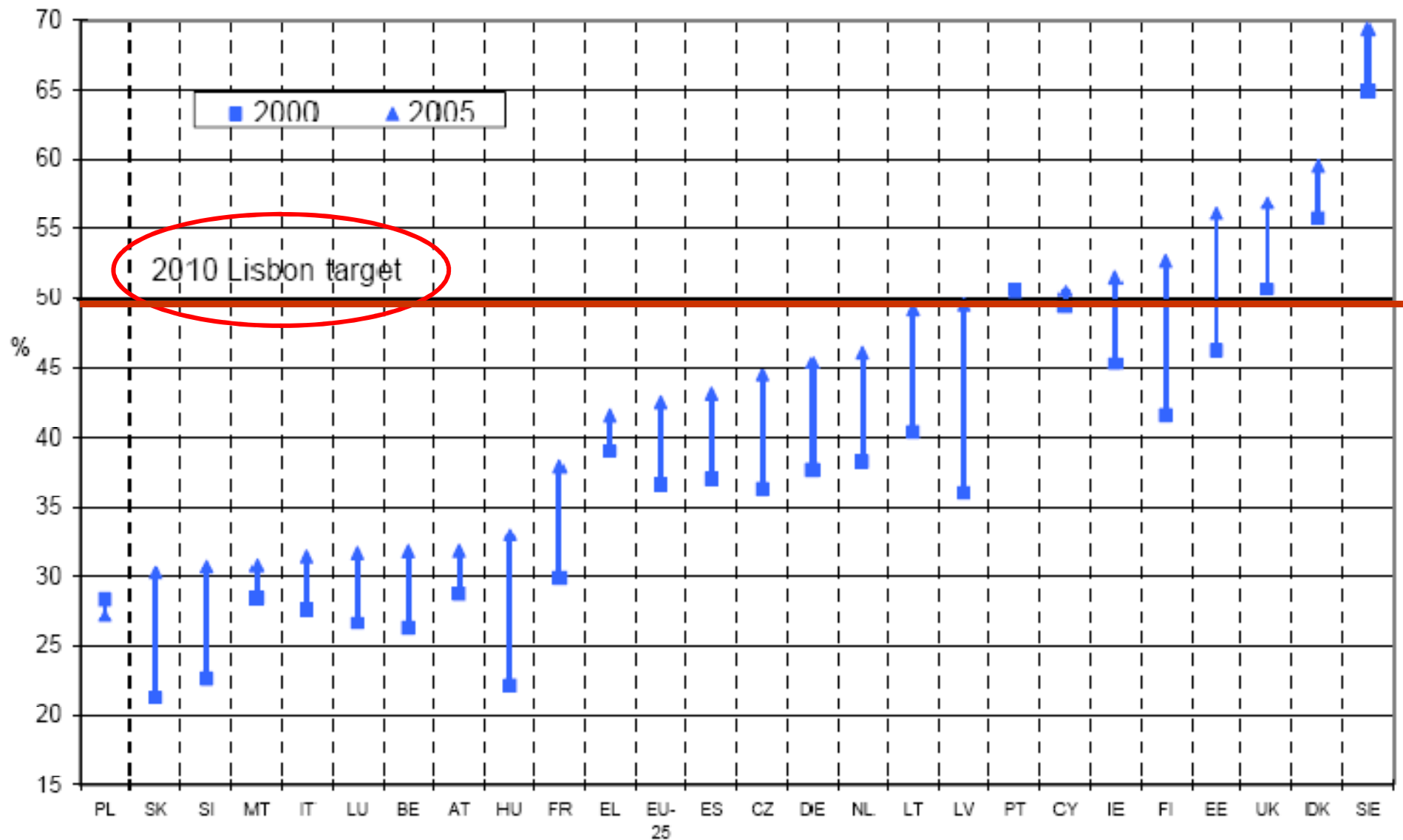
Effects of older people’s role as a socio-economic resource for society:

- on individuals: e.g. identity, social inclusion and intergenerational solidarity;
- on governments, society, welfare state and companies: savings, social cohesion etc.

Cross-cutting topics in the activation of older people’s potential:

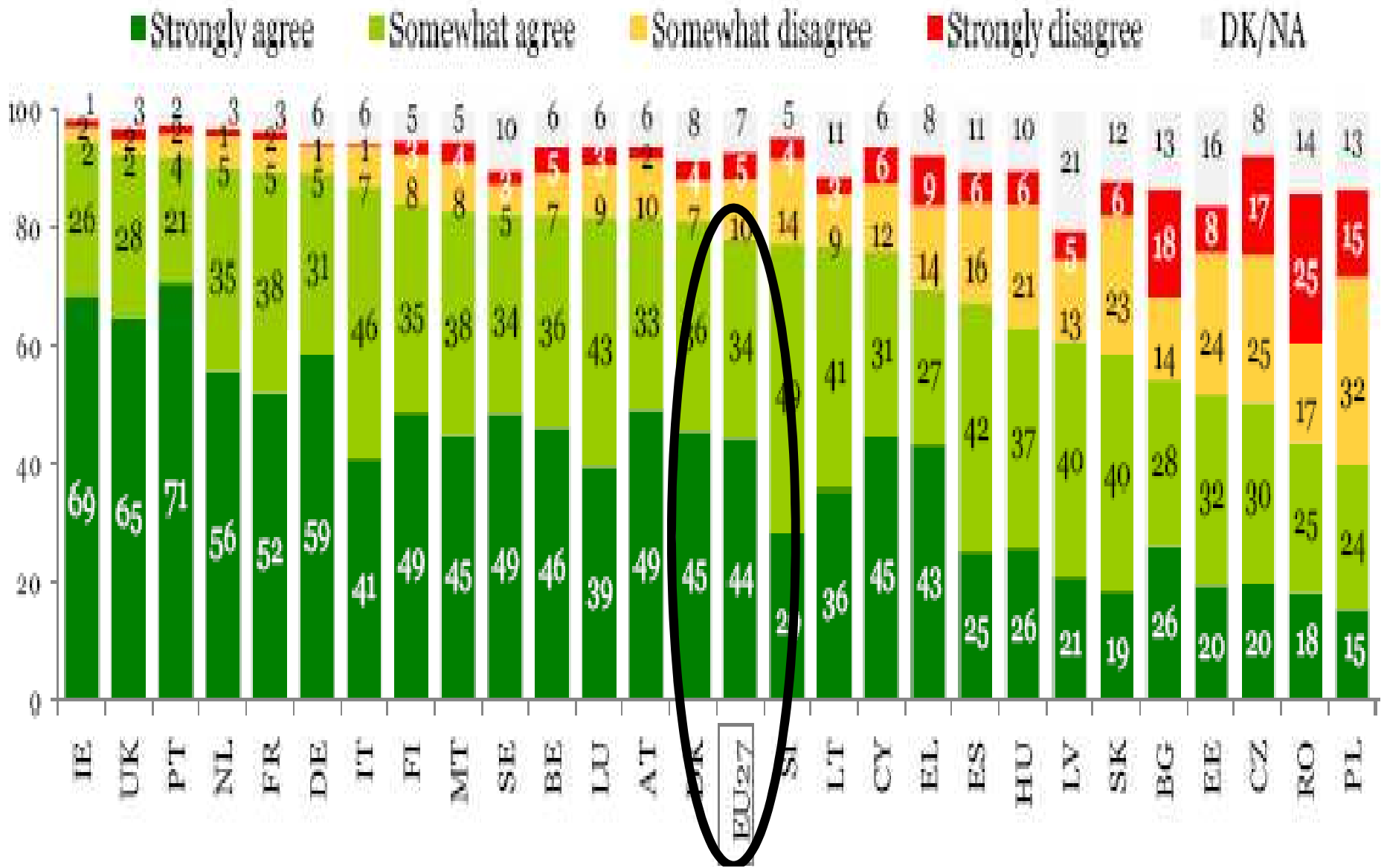
- preparation for old age: financial literacy, nutrition, competence with ICT etc.;
- public policies (individually vs. policy driven changes) and normative expectations;
- barriers and opportunities for the different activities, including generational issues.

Change in employment rate of 55-64 year old in EU-25 (2000-2005)

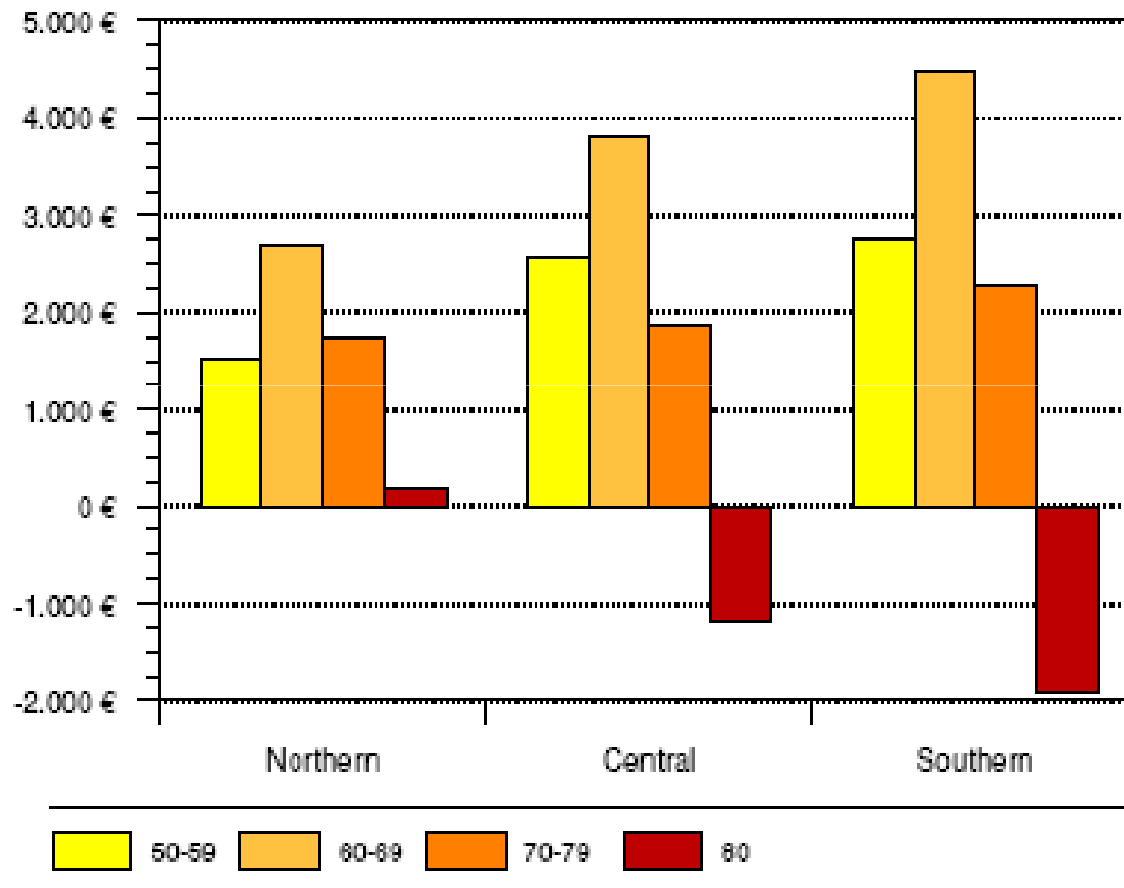


Source: Aliaga and Romans, 2006

Older people make a major contribution as volunteers in charitable and community organisations



Balance of intergenerational financial transfers and social support, by age group and European area



Source: Kohli, 2008

2. Outputs of Working Group 4

<i>Perspective</i> <i>Area</i>	Older people as a “socio-economic” resource for society (OP for society)	Older people as users/recipients of socio-economic resources (Society for OP)
Care	<u>Working Group 1: Older people as caregivers</u>	<u>Working Group 2: Dependent older people</u>
Other socio-economic areas	<u>Working Group 3: OP as social and economic resource</u>	<u>Working Group 4: Socio-economic needs of older people</u>

2. Outputs of Working Group 4

Working Group 4: **Socio-economic** **needs of older people**

Social needs

- Social inclusion and participation, including role of media representations;
- Social solidarity mechanisms in the society and in the family;
- A new sociology of generations to identify material and non-economic transfers.

Economic needs

- Income maintenance;
- Pension system developments to ensure equity and sustainability;
- Consumption patterns over the life course (including effects of financial crisis).

Cultural needs

- Religion and spirituality;
- Communication and media utilisation.

Vulnerability

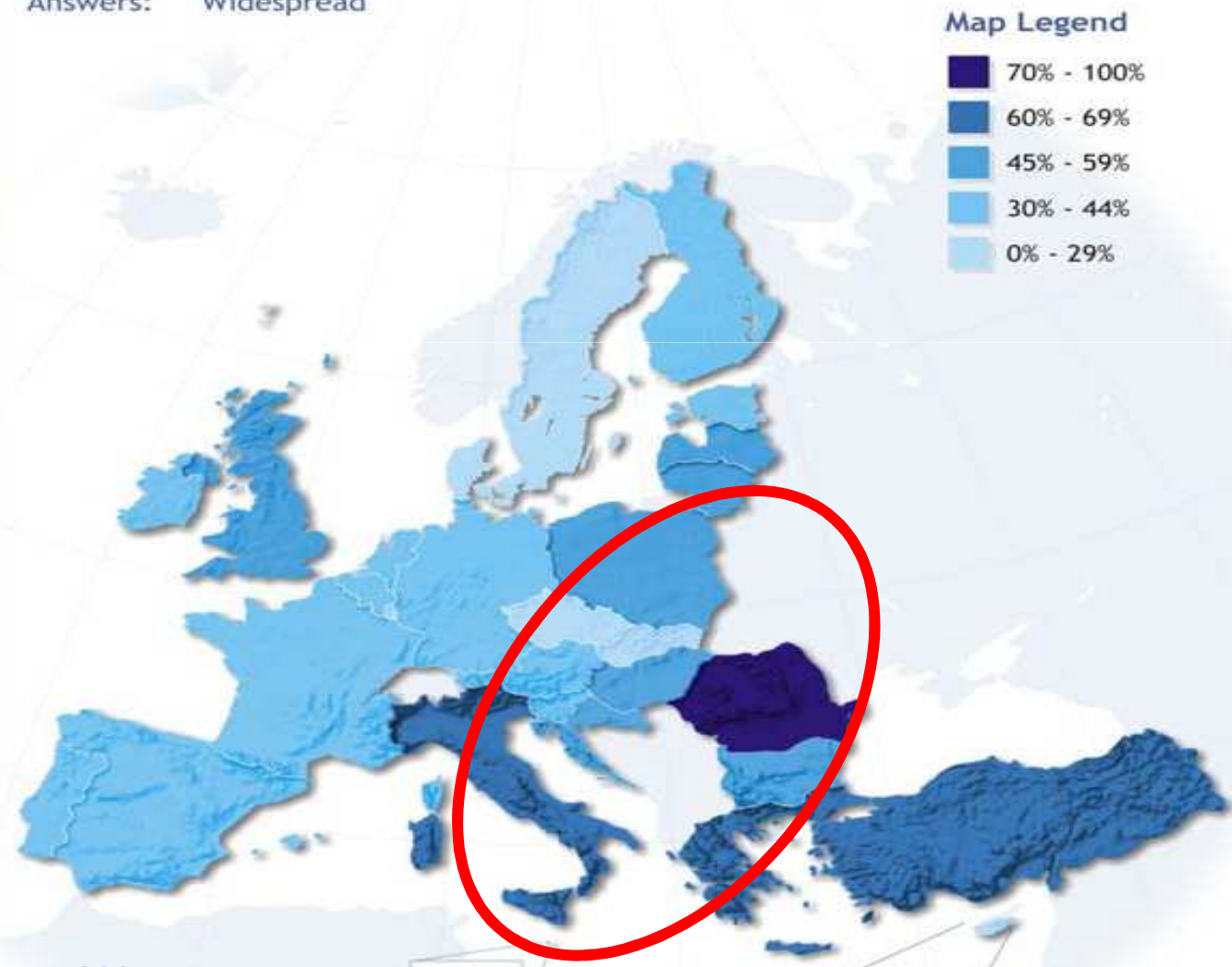
- Elder abuse and neglect;
- Living arrangements of different groups, esp. of those living alone and refugees;
- Accumulation of life-long disadvantages, including disability and rural isolation;
- Socioeconomic inequalities which continue over the life course into old age.

Prevalence of elder abuse and neglect

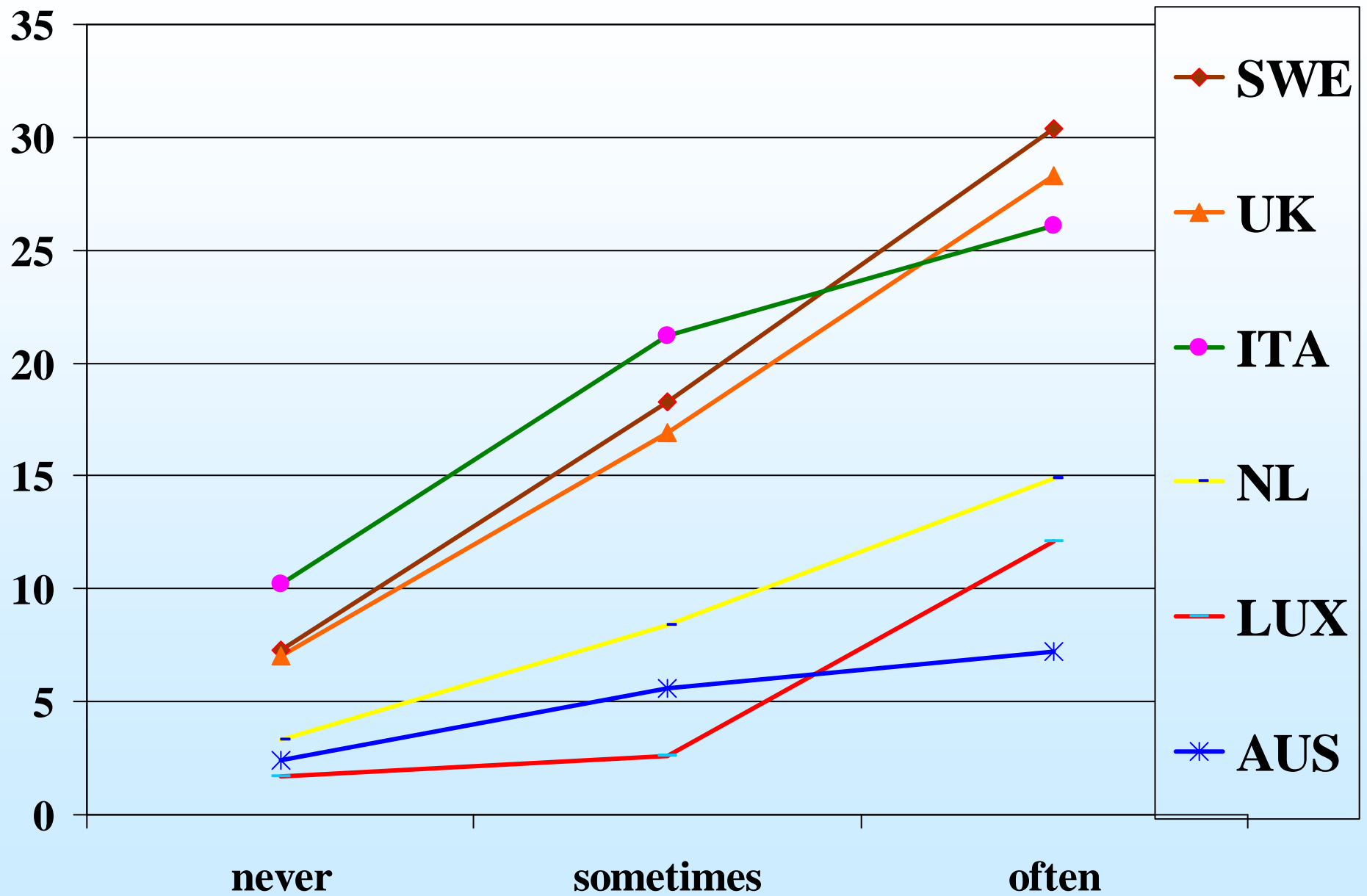
Country Results		
	Romania	86%
	Greece	64%
	Italy	63%
	Lithuania	58%
	Bulgaria	53%
	Hungary	51%
	Latvia	50%
	Poland	48%
	European Union (27)	47%
	United Kingdom	47%
	France	43%
	Portugal	43%
	Germany	42%
	Spain	39%
	Estonia	39%
	Belgium	36%
	Slovenia	35%
	The Netherlands	34%
	Austria	34%
	Malta	34%
	Finland	33%
	Ireland	32%
	Czech Republic	27%
	Denmark	23%
	Luxembourg	22%
	Slovakia	20%
	Sweden	19%
	Cyprus	17%

Question: QA30. Could you please tell me whether, in your opinion, poor treatment, neglect and even abuse of dependent elderly people is very widespread, fairly widespread, fairly rare or very rare in (OUR COUNTRY)?

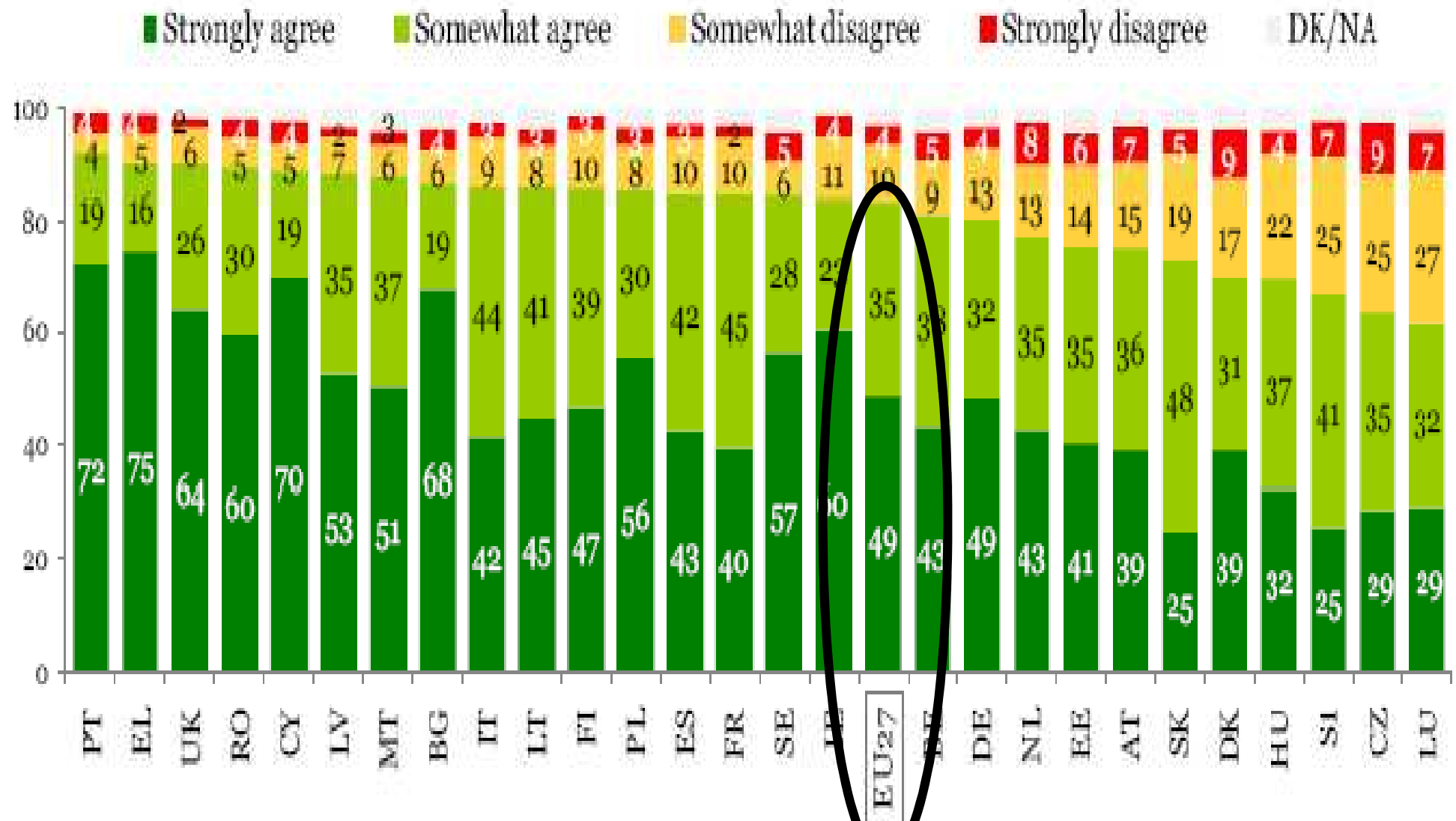
Answers: Widespread



Economic distress by frequency of loneliness (ESAW data)

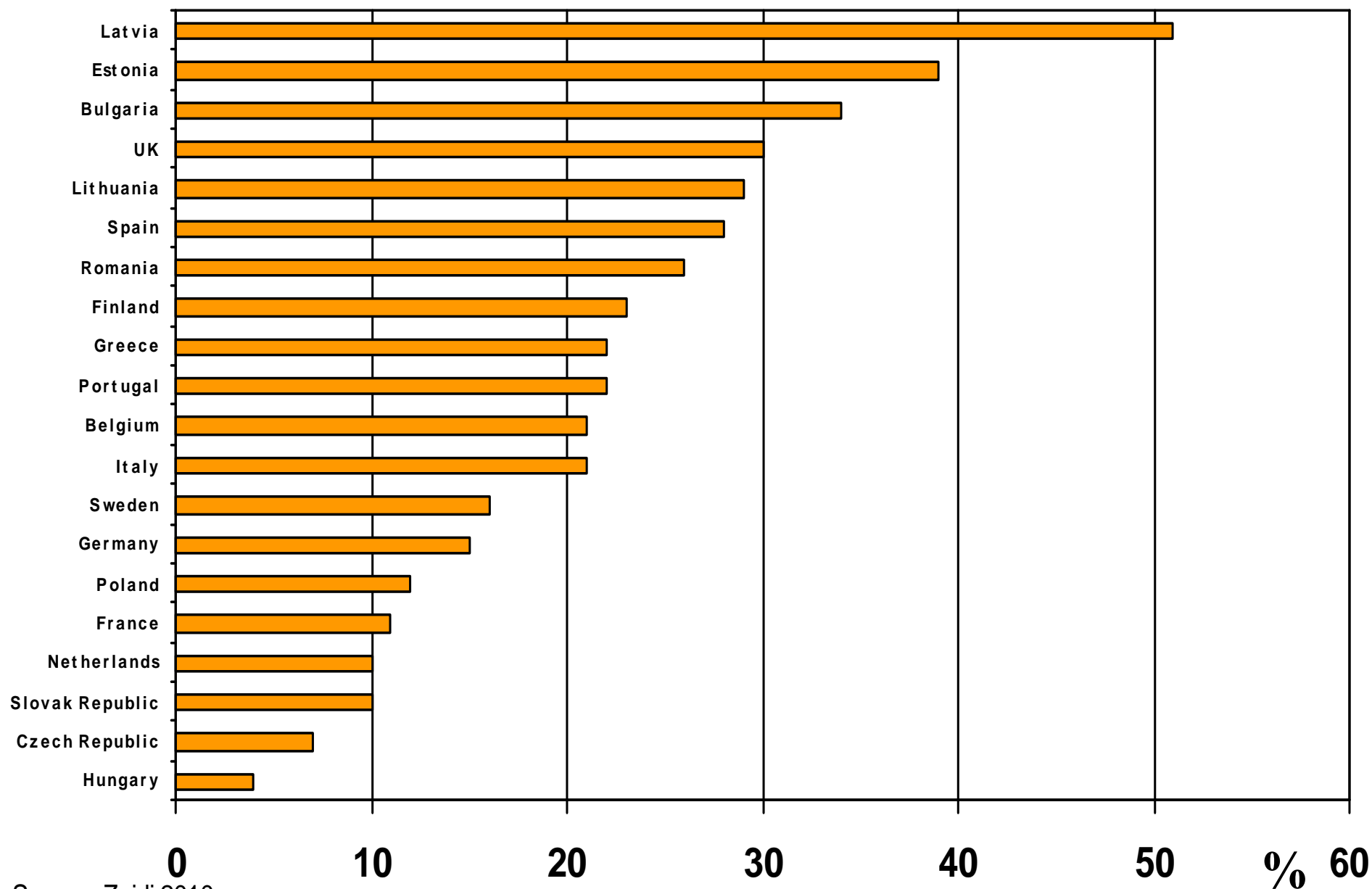


Our government must make much more money available for pensions and care for the elderly



Source: Special Eurobarometer 2009

Older people at risk of poverty (2008)



Source: Zaidi 2010

2. Outputs of 1st round: cross-cutting aspects

<i>Perspective</i> Area	Older people as a “socio-economic” resource for society (OP for society)	Older people as users/recipients of socio-economic resources (Society for OP)
Care	<u>Working Group 1: Older people as caregivers</u>	<u>Working Group 2: Dependent older people</u>
Other socio-economic areas	<u>Working Group 3: OP as social and economic resource</u>	<u>Working Group 4: Socio-economic needs of older people</u>

Methodology, infrastructure & transferability

2. Outputs of 1st round: cross-cutting aspects

Methodology issues:

- **Methods and study design**
- **Data accessibility**
- **Coordination and collaboration in ageing research**
- **Interdisciplinarity**

Infrastructure and transferability:

- **a European Institute on Ageing or a research forum?**
- **Cross-national coordination of the ageing research agenda**
- **Funding ageing research in Europe**
- **Transferability to society of ageing research's results**
- **Capacity building**

Thank you!