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Policy to reduce late-life social exclusion: from aspirations to action

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Introduction

For those of us who devote our professional lives to understanding social challenges of population ageing, who see inequities and embrace a social justice agenda, in the end we must ask—*so what?* How can this knowledge we have created, the networks we have developed and our theoretical insights make a difference in the lives of older people?

From the outset, the mission of Reducing Old-Age Social Exclusion (ROSEnet) was to create shared understandings of late life exclusion that would be foundational to the development of meaningful policy and practice. It is an ambitious agenda, given the goal of reducing exclusion across broad contexts of peoples' lives that intersect and that evolve and diverge across the life course.

Policy is the most macro of these contexts. It is within the policy environment that we can come to understand values about age and ageing, about who is seen to be deserving of full citizenship and about how these cultural ways of knowing frame courses of action within a society. Chapter authors in this section of the book speak to these big policy questions and to the global and regional aspirations that underlie the approaches to late life social exclusion. Others address the actions needed and those that have been taken toward legislation and regulations to reduce exclusion.

The purpose of this chapter is to consider social exclusion as a policy framework for population ageing and older persons, highlighting key debates and where we should embrace them in more than just rhetoric. We introduce the 6 chapters in this section that provide important narratives on these debates and actions.

Social exclusion as a policy framework

Policy experts have argued that “the most difficult policy questions tend to have at least some element of disagreement about what is valuable and how things ought to be” (Muers, 2018 p14). This statement resonates given the longstanding discussions about population ageing and the value of older people. Early theorising placed older people as conditional citizens—dependent, burdensome and unproductive—where policy levers such as mandatory retirement were consistent with moving older people out of the mainstream. But such certainty about appropriate action was soon challenged. Concepts such as ageism began to populate the lexicon of ageing. Butler's (1969, p243) provocative statement naming ageism as “a form of bigotry we tend to

overlook” is an example of powerful voices that have a hallmark of ageing policy discourses for 50 more than years. We’ve come a long way, though the policy terrain remains uncertain.

Social exclusion moves the lens firmly away from discourses of burden to a view of older people as full citizens with rights of access to societal resources that are not contingent on age. Its values-stance and focus on a large and growing group of older adults could be a touchstone for the decisions that governments will undertake and the values that drive those decisions. It reminds us that while the visible elements of public policy are embodied in "constitutions, legislative acts, and judicial decisions" (Peters, 2015, p3), it is the symbols, narratives and language that define “what is fair, what constitutes right and wrong...and similar ethical matters” (Muers 2018 p7). Together these two elements of policy (the values and the actions on which they are based) determine the extent to which the lives of older persons are improved across the life domains articulated in this framework.

We believe that social exclusion is a timely and relevant approach to the development of meaningful policy and practice. It allows for an examination of policy drivers as well as policy actions and it places onto public agendas the contemporary values-debates that so often lead to the policy dilemmas that Muers describes. An important question is the extent to which the particular values underpinning social exclusion are likely to be broadly embraced and enacted. There are promising signals. In her analysis of EU social policy development undertaken several years ago, Daly (2008) noted that social exclusion had been taken up as a template for social policy development. She argued though that its implementation had foundered, in a setting of weak pressure from relevant constituents, vague targets and lack of clarity on desirable outcomes. At that time, she saw little political commitment “to address the kind of problems that the concept of social exclusion originated to characterize” (p16).

Policy challenges and contemporary public and political debates

It’s perhaps not surprising that the (EU) social policy process and its links to social exclusion have been uneven and its pathways unclear. In some ways it seems a classic example of the policy development process: “recursive and discontinuous and involving many steps and dynamic factors over a considerable period of time” (Pawson, 2011, p10). Nonetheless, the past decade has seen impressive levels of endorsement of values around reducing social exclusion.

United Nations agencies have been instrumental in redefining the values discourse. The World Report on Ageing and Health (World Health Organization 2015) took as its major premise that older persons should expect to live in ways that they are important to them. The United Nations 2030 Agenda for Sustainable Development (2015), has a similar vision though a broader reach: to leave no one behind. Both have goals of realising human rights for all. Both place the onus on governments to reduce inequities that can lead to exclusion. Both have been adopted by countries around the world.

At the same time that thought leaders are changing the values agenda, strategies toward action are increasingly prominent. Pressure from relevant constituents is becoming more organized and sustained through organizations such as AGE Platform Europe (<https://www.age-platform.eu/>), a European network of NGOs that promotes interest and raises awareness of issues of concern to

older persons in the EU. AGE Platform members are organizations of older people. They too have as their vision “an inclusive society for all ages”.

What then is the place of evidence in the policy process? Chapters in this book have illustrated the impressive accumulation of knowledge across broad domains of late life exclusion. Evidence matters. It matters in reducing risk of unnecessary harm and in achieving important policy goals (Parkhurst, 2017). Policy theorists caution against assuming a direct relationship between sound scientific knowledge and the adoption of a particular public policy action (Cairney, 2016). The relative power of evidence is always muted by values, political agendas and competition among multiple social goals (Fisher 2019; Parkhurst 2017).

Outline of this section

Chapters in this section of the book establish many of the important issues and debates around social exclusion: values and beliefs about the place of older people in society; aspirational versus legislative documents to address social exclusion; and evidence of structural sources of social exclusion.

Conboy (chapter 8.2) and Kucharczyk (chapter 8.7) each provide critical analyses of some of international policy documents that delineate contemporary values and principles to address social exclusion. Conboy addresses macro policy issues that are foundational to the UN Sustainable Development Goals and the 2030 agenda for Sustainable Development. She lays out the processes and barriers between governments signing on to a global agenda to ‘Leave no one behind’ and actions that might affect the lives of older people. Kucharczyk analyses the European Pillar of Social Rights (EPSR), a set of social rights and principles to improve lives of the Europeans through more equality, inclusion and well-being. The rights-based approach makes EPSR a powerful tool for harmonization of policy instruments, though increased political commitment and accountability are needed for it to succeed.

Grigorieva et al (chapter 8.4) and Ogg (chapter 8.3) address approaches to pension reform and their likelihood of increasing risks of late life economic exclusion. Grigorieva et al undertake a comparative analysis of pension reform and the structure of social services in post-Soviet Russia and Ukraine. They come to a stark conclusion that the intersections of low income, chronic illnesses and poor access to services including social care may lead to deep exclusion of older people in both countries. Ogg examines European pension systems in the context of new social risks resulting from shifting political systems, rapid technological change, and economic uncertainties. He highlights issues including extended working life that increase likelihood of economic exclusion in old age.

Although both address specific domains of exclusion, both Leppiman et al (chapter 8.6) and Anderson et al (chapter 8.5) also speak to the values that influence change. Leppiman et al discuss digitalisation and its potential both to improve lives of older people through access to services and information and to exclude them. They use the example of Estonia and Finland to illustrate how what they call values-based technology development could enhance well-being of older people. Andersen et al undertake a micro policy analysis of how nursing home design can reduce spatial and community exclusion. Their four settings illustrate different approaches to connecting

with the local community. They emphasise the importance of residents as a heterogeneous group with different needs, values and capabilities.

From aspirations to action

In many ways, social exclusion has come of age. Its values are embedded in global social agendas and its language in regional policy frameworks. Actions to reduce exclusion are emerging with steady pressure from constituencies such as older persons organisations. Articulation of an explicit social exclusion conceptual framework and evidence to support it have created a solid foundation to inform social action. Chapters in this section have identified gaps between aspirations and action and have identified both opportunities and barriers to address them.

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