Index

Action Plan on Information and Communication Technologies and Ageing 68
ActivAge Consortium 9, 27, 29, 32, 40, 43, 101, 104, 126, 130
Activating Senior Potentials in Ageing Europe (ASPA) survey project 139–40
activation 20, 155, 159–63, 164, 173
activation compromise, Germany’s new 18, 20–21, 148–51, 269
activation 159–63
motives behind 168–72
prospect and sustainability of 172–3
recalibration and institutional integration 163–8
‘active’ 35, 64–5
active ageing 9, 11–12, 14–15, 19, 21, 22, 27–8, 274
concept coined by WHO 66, 67, 75
criticisms of 35–6
emergence of 33–5, 46–7
EU approach 56, 71
European Year 2012 39–40, 47
future strategy for 40–43
new approach to 43–6
normative issues of 263–6
OECD approach 60–61, 71
policy development in Poland 20, 127–39, 140–142
principles for strategy 43–5
towards policy in Europe 36–9
WHO approach 64–5, 69–70, 71, 126
Active Ageing: A Policy Framework 64
active labour market policy (ALMP) 149, 164, 166, 172, 265, 269, 271
‘activity’ 11–12, 43–4
adult disability dependency ratio (ADDR) 8, 22, 257–8
Age Action Ireland 80–81, 89
age discrimination 11, 29
AGE Platform 138, 143
age-related spending 12–13, 182, 194–5
Age UK 185
‘age well’ programme 200
ageing
challenges of 257–60
early discourses on 28–30
and health 5, 57–9, 62
and long-term care 205–25
new politics of 30–33
see also active ageing; productive ageing
ageing policy
defining and operationalising 8–13
in health 53–75, 272
introduction 1–3
Norway 188–99
paradigm 183–5
role of institutions and ideas 16–18
role of international organizations 13–16
UK 181–8, 194–9
Ageing Report 38–9, 59, 68
agenda setting 180–181, 201
Ahtonen, A. 43, 44
anonymity 83
Arber, S. 31, 46
Arts, W. 148, 179
Augustyn, M. 209, 220
autonomous ageing 68, 72, 74–5, 272
autonomy 35, 65–6, 68, 70, 264
BA (Federal Employment Agency, Germany) 150, 156–8, 162–3, 166
Baars, J. 78–9, 88, 94
Balcerowicz Plan 127
Barcelona Summit 38
Barr, N. 39, 41
basic income (BI) 157, 159, 165–6, 172, 173
The making of ageing policy

Bass, Scott A. 9, 12, 34, 263
Béland, D. 16, 180, 181, 259, 261–2, 274
benefit retrenchment 84, 134, 159–60, 169–71
Bettio, F. 213, 217, 219, 222, 223–4, 226
Big Society 43, 185, 186, 200, 246–7, 250
Bismarckian system 29, 128, 169
Blair, Tony 187
blame avoidance 87, 98
Bledowski, Piotr 129, 131
BMAS 156, 159, 165, 166, 169
BMF 165–6
BMFSFJ 167, 248
BMG 153, 248
Bondevik II Coalition government 188, 192, 193, 200
Bonoli, Giuliano 106, 149, 169
Britain see UK (United Kingdom)
Brown, Gordon 187
Brücker, H. 152, 173
burden of ageing
discourses 31–2, 53
economic 21, 182, 199, 258, 262
and generational fairness 197, 201
motivation for report 243
and OADR 5, 8, 104, 259–60
and OECD 61, 68–9
Cabinet Office 185–6
Cameron, David 200
Campbell, J.L. 16–17, 54, 55, 180–181, 259
care insurance 247
care workers
in Germany 249, 273
low remuneration level 219, 222
migrant 21, 207, 209, 214, 219, 221–2, 224, 249, 273
privately employed 221–2
Caring for our future: reforming care and support 247
cash-for-care schemes 21, 209, 219–21, 224
catch-up factor 169–70
catch-up process 155–9
CDU (Christian Democratic Party) 150, 154, 169, 170, 171, 173
Centre for Senior Policy (CSP) 192, 196, 198
Chiatti, C. 217–20, 222, 226
Chlabicz, S. 219, 224
Christensen, J.G. 98, 114
Clarke, A. 34, 36
co-creation (samproduksjon) 250
coalition governments
Danish 108–9
German 169, 173, 263
Norwegian, Bondevik II 188, 192, 193, 200
Norwegian, Red-Green 191, 192, 200
UK 110, 184–8, 199, 200
Colombo, F. 13, 223, 225, 231, 233–5, 238, 244, 249, 251
Commission of the European Communities 56–9, 67–8
Commission on Funding of Care and Support 245
company-level policy 139–40
Competence Lift 241
Confederation of German Employers’ Associations (BDA) 170
Confederation of German Trade Unions (DGB) 171
confidence 82–3
consensus building 41, 187–8, 200, 260–263
Conservative parties
Danish 108–9
Norwegian 190–191, 193, 198
UK 185–6
coordinated market economies (CMEs) 148, 170–172
cost saving, quest for 183–5
‘crisis discourse’ 83–4
Crowley, J. 41, 47
Cumming, E. 12, 33
Daatland, S.O. 22, 34
Danish Welfare Commission 100–102, 106, 108–9, 110, 112, 115, 117, 119
Deacon, B. 14, 60, 63
‘decline and loss paradigm’ 35
defamilialization 233, 273
defined benefit (DB) systems 31, 267
defined contribution (DC) systems 128, 136, 267–8
demographics
  Denmark 4, 6–7
  European 3–8, 27
  Germany 4, 6–8, 151–3, 248
  Ireland 3–7
  Italy and Poland 4–7, 207
  Norway 4, 6–7, 188–90
  UK 3–8, 181–3
  Denmark 20, 32–3
demographics 4, 6–7
  pension policy 100–102, 106, 108–9,
  110, 112, 115, 117, 119
Department for Work and Pensions
  (DWP) 22, 110, 201, 238
Department of Health 80, 183, 184,
  234, 245, 246, 254
Department of the Taoiseach 80, 82,
  89
Diamond, P. 39, 41
Dilnot Commission 184, 245–6, 252
disengagement theory 12, 22, 33
Doyle, Martha 81, 233
Drożdżak, Zuzanna 225
early retirement
  Denmark 109, 112
  Germany 107, 113, 160–161, 167,
  170, 171
  Norway 108, 111
  Poland 131–2, 134, 139–40, 147
  policy 10–11
towards active inclusion 269–72
Ebbinghaus, B. 32, 269
employment
  focus on, in European policy 37–42,
  56, 67
  Germany 152, 155–9, 269
  Norway 270–272
pacts 166
  Poland 20, 124–5, 129–30, 131–3,
  135, 141–2, 269–70
  ratio to population 6–7
  UK 186, 195, 197
  of women 164, 213, 223, 270
Ervik, Rune 42, 54, 60, 98, 104, 118,
  153, 181, 262
Esping-Andersen, Gösta 5, 101, 125–6,
  148, 153, 154–5, 159, 164, 179,
  189, 206, 233, 263, 273
EU (European Union) 14–16, 19
  ageing policy in health 56–9, 67–75,
  272
demographics 27
  Poland, after accession 20, 131–3,
  136–7, 139, 140, 142, 224
  Poland’s preparation for entry
  129–31
  policy-making capacity 42–3
  productive ageing focus 265, 272
towards active ageing policy 36–9,
  45, 46
Eurobarometer 137, 208–10, 215–19,
  274
EUROFAMCARE 208, 213–15,
  219–20
Europe
  active ageing policy development
  36–9
  changing conditions 30–33
demographic changes 3–8
  European Year 2012 39–40
  research and development 45
  role of international organizations
  in 13–16
  European Commission (EC) 36–9,
  42–3, 75, 137, 210–212, 225–6
  European Employment Strategy (EES)
  56
  European Year for Active Ageing and
  Solidarity between Generations
  19, 39–40, 47, 138, 142, 192, 274
  European Year of Older People 36–7,
  41
  Eurostat 7, 27, 135, 207, 223
  Evandrou, M. 31, 46
  ‘exhausted voluntarism’ 268
  familialism 207, 233, 251–2, 273
  familialist/individualist paradigm
  233
  Familienpflegezeitgesetz 248
  family care
  in Germany 22, 149, 164, 205–6,
  235–6, 247–9, 251–2
  in Italy and Poland 21, 211–18,
  223–4, 273
  in Norway 243, 251–2
  shrinking pool of 62
  unpaid 237, 239–40
Federal Employment Agency, Germany (BA) 150, 162–3, 166
Fehmel, T. 160–161, 164
Ferge, Z. 31, 126
fertility 27, 133, 164, 168, 205, 241, 258
fixed retirement 29–30
‘formal’ care
cash-for-care schemes 219–21
home care services 218–19
privately employed care workers 221–2
residential care 221–3
Forum 50+ Seniors of the 21st Century 138
Foster, L. 29–31, 41, 267
‘Four Pillars’ initiative 40
framing ideas 17, 54–5, 70–72, 75
functional health 65, 70, 72, 74
FUTURAGE 43, 47
Gelissen, J. 148, 179
generational fairness 182, 195, 197, 200–201, 268
Geneva Association 40
Germany 20, 21–2, 148–51, 262–3
continental welfare regime 2
demographics 4, 6–8, 151–3, 248
employment rates 155–9
long-term care needs 231–2, 273
analytical framework 232–4
care regimes 234–40
comparison 249–52
predictions for 153
strategies to meet 240–241, 247–9
making of ageing policy 168–72
new activation compromise 149–50
activation 159–63
institutional integration 164–8
motives behind 168–72
prospect and sustainability of 172–3
recalibration 163–4, 168
old-age dependency ratio (OADR) 151
pension policy 100–101, 103–7, 113, 116, 118–19
policy response, expectations of 154–5
turnaround of socio-economic trends and unique reform activity 155–9
Geyer, J. 160, 173
Ginn, J. 30, 31
global ageing 69–70
Golinowska, Stanisława 143, 214, 220, 224
Gori, C. 209, 219
government change in Norway 192–4
governmental commissions 20, 98–9, 118–19, 262
and policy developments 102–3
recommendations and responses 107–10, 111–13
sample of expert 99–101
understanding of challenges 104–7
undertaking of recommendations 110, 114–18
Green Party (Germany) 169, 170–171, 173, 263
Grundtvig programme 139
Guillemard, A. 29, 31, 45
Hall, P. 18, 148, 159, 180
Hartz IV see basic income
Hassel, A. 152, 165, 170–172
Hausner Plan 129–30, 135, 147
health
comparison of policy discourses 67–75
EU 56–9
OECD 60–63
WHO 63–6
‘healthy ageing’ 5, 39–40, 53, 59, 62, 65–6, 70, 74
healthy life expectancy (HLE) 3–5
Helgøy, Ingrid 181
Help Wanted? Providing and Paying for Long-time Care 62
Henry, W.E. 12, 33
Hinrichs, K. 100, 116, 269
HM Treasury 182–4
Holstein, M.B. 35–6, 264
Holstein, M.B. 35–6, 264
home care services 218–19
Horizon Europe 2020 strategy 38, 42
Huber, M. 211, 213, 218, 220, 222, 226
Index

ideas
  conceptual framework 54–6
  development of active ageing policy 127–37
  policy 180–181
  role of 16–18
ideological frames 181, 186, 191, 193–4, 196–7, 198, 199, 200–201
Inclusive Working Life (IWL)
  agreement 190, 191, 192, 270
incrementalism 88, 115, 262
independence 35, 65–6, 68, 70, 74–5, 264
individual responsibility 79, 94, 195, 252, 267–8
individualization 253, 267, 268
informal care
  family care 211–14
  German scheme 248
  leave for carers 249
  OECD definition 225
  other sources 216–18
  paid work versus unpaid family care 214–16
  ‘innovation in care’ 22–3, 243–4, 254
Innst. S. 191, 193–4
institutions, role of 16–18
insurance
  long-term care 22, 232, 235, 239, 247
  in Poland and Italy 209, 211
  social, in Germany 154, 156–8, 169–70, 236, 240
  social, in Norway 195, 197
  voluntary private 248, 273
see also UIB
international organizations
  role in Europe 13–16
  role in health and long-term care 56–75
Ireland
  Irish context 79–81
  participation of older people in policy-making process 89–93
  politics of old age 19, 78–9, 93–5
  research design and methodology 81–3
  social policy formulation, perceptions of 83–9
Irish Senior Citizens’ Parliament 80–81, 89
Italy 21, 205–6, 223–5, 272–3
  cultural attitudes and policy views 208–10
  demographics 4–5, 6–7, 207
  financial issues 210–211
  ‘formal’ care 218–23
  informal care 211–18
  welfare and care regimes 206–7
Iversen, T. 18, 189
Jochem, S. 98, 271–2
Kasneci, D. 67, 75
Kildal, Nanna 53, 67
kindergarten places 167–8
Kingdon, John W. 16, 180, 262
Kohli, M. 31, 37, 46, 206
Kraus, M. 212, 223
Kuhnle, Stein 179, 272
labour market
  and ageing 10–11, 152
  difficulties in Poland 130–131, 140–142
  in Germany 156–8, 163–4
  in Norway 190–191, 194
  in Poland and Italy 213–15
labour market participation rates (LMPRs) 5–7, 269
labour market policy (LMP) 20, 149, 258–9, 269–72
Labour Party (Norway) 190–191, 192, 193–4, 198
Labour Party (UK) 183–4, 186, 187–8, 201, 245, 252
Lamura, Giovanni 214–17, 220
Leonardo da Vinci programme 139
liberal market economies (LMEs) 148
liberal welfare regime 2, 104, 179, 252
life course perspective 11, 34, 41–2, 45–6, 66, 271–2
life cycle perspective 59, 61, 69, 80, 89, 101
life expectancy after pensionable age (LEPA) 3–4, 105–6
life expectancy (LE) 3–5
  and POADR 259
  in Poland 125
  women 213
Lindén, T.S. 110, 115–19, 262
The making of ageing policy

Lisbon Council 38, 56, 58, 129
Live Longer, Work Longer 61
long-term care (LTC) 12, 21–2
comparison of policy discourses
67–75
definition 70
EU 56–9
in Italy and Poland 205–25
needs, in UK, Norway and Germany
231–2, 253, 273
analytical framework 232–4
care regimes 234–40
comparison 249–52
strategies to meet 240–249
OECD 60–63
policies 272–3
problem of, in UK 183, 195
WHO 63–6

Long-term public finance reports 182, 184
Lynch, J.F. 100, 269

Madrid International Plan of Action on Ageing 14–15, 95
Maintaining Prosperity in an Ageing Society 60–61
Maltby, Tony 11, 28, 33, 36, 40–41, 44, 101, 127, 205
Management by Objectives (MBO) 163, 166
Manow, P. 152, 154
Marier, Patrik 98–9, 110, 114, 116, 117, 119, 262
Marshall Plan 60, 188
Mayer, K.U. 34, 46
medical card protest 86, 95
Melchiorre, Maria Gabriella 219
Ministry of Labour and Social Policy 133, 136, 142–3, 147, 221, 226
Moen, P. 30, 34
MPiPS 130–133, 140, 143

Naegele, Gerhard 29, 32, 33, 39, 90, 105
Natali, David 98, 206
National Council of Ageing and Older People 80
National Employment Savings Trust (NEST) 42, 110, 268
National Health Service (NHS) 182–3, 184, 235, 245, 247, 252
neo-liberalism 30–31, 79, 80, 84, 252
NHO Service 238, 242
Nilssen, Even 53, 56, 67, 74
non-government organizations (NGOs) 32–3, 137–9
non-state pension pillars 261
Norway 20, 21–2
ageing policy processes 179–80, 199–201
agenda setting and policy ideas 180–181
comparison with UK 194–9
government change, policy community and ideological frames 192–4
welfare state sustainability 188–90
working more and longer 190–191
demographics 4, 6–7, 188–90
long-term care needs 231–2, 253, 273
analytical framework 232–4
care regimes 234–40
comparison 249–52
strategies to meet 240–249
pension policy 100–102, 105–7, 110–111, 114–15, 118–19
Norwegian Ministry of Health and Care Services 191, 234, 241, 254
NOU 22, 100, 105–6, 108, 189, 191, 243–4, 249, 250, 254
nursing homes
in Norway 234, 242–3, 251
in Norway, UK & Germany 236–7, 239, 252
in Poland and Italy 208, 222–3
Nvivo 9 81–2

OADR (old-age dependency ratio) 5–8, 104–6, 151, 189, 252, 257–60
Observatory 36
occupational pensions 13, 31, 40, 68, 100, 102, 108, 119, 267–8
OECD (Organisation for Economic Co-operation and Development) 14–16, 19
Index

ageing policy in health 60–63, 67–75, 272
definition of informal care 125
old-age dependency ratio (OADR) 151
productive ageing focus 265, 272
‘old-age targeting’ 85–6, 94
see also targeting care benefits
older people
growing proportion of 27
increasing political participation 32–3, 153
interest organizations 89–93, 138–9
Irish perspectives on entitlements 83–9
perceptions of 28–30, 31
older workers
active inclusion of 269–72
changing policy for 10–11
company-level policy towards 139–40
initiatives for 161–2, 164–5
labour market participation 6–7
raising employment rate 37–9
reluctance to employ 135, 141–2
Omsorgsplan 2015 241
Open Method of Coordination (OMC) 15, 42, 56–7, 67
Österle, August 231–3, 238, 239–40, 249, 253
Øverbye, Einar 98, 262
paradigmatic ideas 16–17, 126
path-dependent financing 22, 241–4, 253
path-dependent service provision 244–7
Pavolini, Emmanuele 231, 233, 251
Pedersen, Axel West 98, 100, 108, 110, 117, 119, 190, 243
pension policy
debate and reform 101, 104–18
governmental commissions 99–103, 118–19
and health inequalities 58, 73, 74
increases in pension age 266–7
new division of provision 268–9
reform in Poland 127–9
in UK 41–2, 187–8, 267–8
Pensions Commission
Norway 100, 107, 111, 192
UK 100, 103, 105, 113, 186–7, 197–8
Perek-Bialas, Jolanta 128–30, 137, 139–40, 210, 225, 248, 272
Phillipson, C. 29, 78
physical activity 36, 65
PNG (Pflege-Neuausrichtungs-Gesetz) 248
POADR (prospective old-age dependency ratio) 259–60
Poland 20, 21
active ageing policy
changes in legislation and institutional landscape 147
company-level policy 139–40
development (1989-2012) 127–37
discussion and conclusions 140–142, 269–70
non-government dimension 137–9
theoretical and methodological framework 125–7
transition to 124–5
ageing and long term care 205–6, 223–5, 272–3
cultural attitudes and policy views 208–10
financial issues 210–211
‘formal’ care 218–23
informal care 211–18
welfare and care regimes 206–7
demographics 4, 6–7, 207
policy discourses
comparison 67–75
differing, on politics of old age 78–9
and ideas 54–6
policy ideas 180–181
policy paradigms 180–181, 183–5, 195–6
policy reform
Irish 84, 91–4
relationship to governmental commissions 110, 114–18
unique activity in Germany 155–9
policy streams 183–5, 190–191, 195–6, 197
Polish Association of Retired Persons, Pensioners and the Disabled 139
The making of ageing policy

Rune Ervik and Tord Skogedal Lindén - 9781781952481
Downloaded from Elgar Online at 04/11/2019 03:39:32AM
via free access
Index

Stenner, P. 33, 35, 36
St.forh. 191, 194
St.meld 188–9, 191, 194, 238, 241, 270
Stockholm Summit 38
Stoltenberg II government 192, 193, 194, 198
Synak, Brunon 129, 131
system transition in Poland 127–9
Szatur-Jaworska, Barbara 129, 135

targeted universalism 63, 69, 73, 74
targeting care benefits 63
see also ‘old-age targeting’
Taylor-Gooby, P. 17, 54, 55
Theobald, Hildegard 235, 247, 249, 250
Third Age 31, 138–9, 142, 184
Timonen, Virpi 80, 231–2, 233, 235, 251
Towards a Europe for all Ages 14, 37, 56, 67
Townsend, P. 10, 29, 35
Tsebelis, G. 18, 154
Turek, Konrad 137–40
see also UK Pensions Commission

UIB (unemployment insurance benefit) 157, 159–60, 166, 173
UK Pensions Commission 100–101, 103, 186–7, 197–8
see also Turner commission
UK (United Kingdom) 20, 21–2
ageing policy processes 179–80, 199–201
agenda setting and policy ideas 180–181
comparison with Norway 194–9
government change and stakeholder management 185–8
need for service versus promise of cost-saving 183–5
sustainability of public finances 181–3
demographics 3–4, 6–8, 181–3
life course perspective 41–2
long-term care needs 231–2, 253, 273
analytical framework 232–4
care regimes 234–40

comparison 249–52
strategies to meet 240–249
UN (United Nations) 3, 14, 23, 64
Year of Older People 37, 56
UNECE (United Nations Economic Commission for Europe) 12, 15–16
unemployment
in Germany 157–9, 160, 166–7
in Norway 271
in Poland 124–5, 130, 131, 135, 140
in UK 185–6
unemployment insurance 160, 163
universal
benefits 63, 100, 104, 200, 236, 246
coverage 57, 62–3, 234–5
earnings-related occupational scheme 100
eligibility 63
flat-rate pensions 100
long-term care schemes 63, 234, 236, 240
medical care 86
nursing insurance 209
tax-funded models 236, 240
welfare arrangements 193, 252
Universities of the Third Age 138–9, 142

varieties of capitalism (VoC) 18, 148
VDK (Sozialverband VDK DeutschLand) 150, 169, 173
Verashchagina, A. 213, 217, 219, 222, 223–4, 226
veto players 18, 98, 117, 150, 154
voluntary saving 136, 267–8
Walker, Alan 5, 9–11, 22, 27–41, 43–4, 46, 53, 66, 68–9, 78–9, 90, 101, 105, 127, 205, 259, 265
Warren, L. 34, 36
WeGebAU 167
welfare regimes 2, 21, 118, 231, 253
conservative 104
continental 2
‘implicit familialistic’ 223
liberal 2, 104, 179, 252
liberal-residual 126, 142
post-communist 2, 124, 272
social democratic 2, 104, 126
Southern European 2, 223, 272
welfare state
Central and Eastern European
countries 125–6
commissions’ views on 118
Germany 148–9, 153–4, 164, 172,
263
‘golden age’ of construction 28–30
new politics of 18, 21
in Norway 188–90, 242–3, 272
and pension expenditure 116
Poland and Italy 206–7
sustainability of 67, 71–2, 188–90,
197, 260
UK 186, 199

WHO (World Health Organization)
and active ageing 9, 34–5, 41, 126
ageing policy in health 54, 63–6,
67–75, 272
autonomous ageing approach 272
healthy ageing approach 265
normative rights-oriented approach
19, 71

women
expansion of employment
opportunities 270, 271
in Germany 152, 156, 160, 164, 167,
174, 251
as informal carers 213, 216, 244–5,
251, 264
life expectancy 3–5, 213
in Norway 249
participation in labour market 58,
59, 67–8
in Poland 124–5, 133, 134–5, 140
in Poland and Italy 207, 213, 216,
218, 222, 226
in UK 244–5
widows in Ireland 88
working more and longer 190–191
World Health Assembly 64

Yeandle, S. 238, 262
Year of Older People
European (1993) 36–7, 41
UN (1999) 37, 56

Zaidi, A. 32, 38, 43
Zelenev, S. 14, 23
Zolyomi, E. 38, 43