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25th volume celebration paper

Alan Walker's paper, 'Towards a political economy of old age', was published in Volume 1 of Ageing & Society (part 1: 73–94).

Towards an international political economy of ageing

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ABSTRACT
This article is an initial scoping exercise for a research agenda on the international political economy of ageing. It begins with a brief review of the various critiques of the political economy perspective that have been made over the 25 years since the first article on the subject. Remarkable for its absence has been criticism of the neglect of an explicit international perspective. Then the article emphasises that it is not globalisation *per se* that is problematic but its dominant neo-liberal economic form. It is mainly because of this globalisation and the related growth in the power of international governmental organisations, such as *The World Bank*, that an international political economy of ageing is required. The bulk of the article is devoted to an outline of the eight key elements that might comprise a theoretical and empirical research agenda for social gerontology. These key elements are: global inequality in old age, development and ageing, globalism and the power of international governmental organisations, transnational corporations, the nation state, supra-national regional structures, the United Nations, and international non-governmental organisations. In the spirit of the other articles that have celebrated the journal's 25th anniversary, this paper is intended to stimulate scientific debate.

KEY WORDS **–** political economy, globalisation, poverty, development.

Introduction

The focus of this article, written for the 25th anniversary volume of *Ageing & Society*, is on the international dimension of policies on ageing. It mirrors the article, 'Towards a political economy of ageing', that was published in the first issue of this journal (Walker 1981). The 'political economy' perspective quickly became a key paradigm in social gerontology

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(Phillipson 1982; Binstock 1983; Guillemard 1983; Myles 1984; Minkler and Estes 1984; Phillipson and Walker 1986; Myles and Quadagno 1991), and has generated an ample flow of critical analyses for more than two decades, latterly as part of the broader 'critical gerontology' perspective (Baars *et al.* 2005). Unsurprisingly, the political economy paradigm has not survived so long without criticism, indeed the 1981 article openly invited it, and some of these critiques have helped to strengthen it. For example, although from the very start it did not neglect gender (Walker 1983; Minkler and Estes 1984; Peace 1986), the dimension did not have a warranted central place. Feminist researchers working in the political economy field have rectified that error and produced a rich sequence of studies on the gendered nature of the ageing process (*e.g.* Arber and Ginn 1991, 1995; Ginn 2003). The early formulations of political economy theory did neglect race and ethnicity, at least as explicit categories of stratification (Blakemore and Boneham 1994), but the paradigm has easily accommodated an important and growing field of social gerontology research (for example, Yu 2000; Nazroo *et al.* 2004; Walker and Northmore 2005).

The most sustained criticism of the political economy perspective has been that it neglects agency or purposive individual human action. The most recent version of this criticism is a part of the 'cultures of ageing' thesis (Gilleard and Higgs 2000). As discussed elsewhere, this fails to recognise the origins of the political economy of ageing as an explicit attempt to counteract the then prevailing functionalist paradigm in social gerontology, which homogenised older people and made them the helpless pawns of what were assumed to be inevitable biological and social processes (Walker 2002, 2005*a*). Political economy theory pointed to the structural constraints on agency, including the role of social policies in opening up or closing down opportunities for older people. It continues to emphasise the central role of the lifecourse, both in structuring these opportunities and in analyses of their outcomes in old age. The 'cultures of ageing' criticism thus purveys a false choice between, on the one hand, agency and identity, and on the other hand, structural determination, for in practice both interact constantly during people's different lifecourse trajectories. Paradoxically, some of the essential tenets of the political economy paradigm, such as the importance of accumulated resources and rights to resources over the lifecourse, are built into the cultures of ageing critique. Nonetheless, in so far as this perspective encourages ageing research to ignore inequality and the crucial role of social policy in enabling or disabling agency, then it is fundamentally opposed to the political economy paradigm.

Surprisingly, the political economy of ageing has not been accused of neglecting the international dimension, yet it is only very recently that research has begun to get to grips with this increasingly important topic. The political economy of ageing is rooted in the relationships between social structure, individual socio-economic status, gender, ethnicity, the lifecourse and the state. Not surprisingly, therefore, its primary attention has been towards the nation state (especially the role of the state in social policies affecting older people). In all developed countries, older people are the main users of state welfare (in terms of expenditure), which allocates the welfare state a special place in social gerontology. Few would doubt that globalisation challenges state welfare, or perhaps more correctly camouflages such challenges (Vobruba 2001, 2004; Kite 2004). This article argues that the political economy of ageing must adopt an international form if it is to interpret fully the changing relationship between old age and the state, a position already adopted by some working within the paradigm (*e.g.* Vincent 2003; Estes and Phillipson 2002; Walker and Deacon 2003; Baars *et al.* 2005), but not more generally. It sets out the reasons why an international perspective is necessary and also outlines the possible forms that it might take. Like the 1981 article, the main purpose here is to stimulate scientific debate and inquiry. First of all it is necessary to clarify the globalisation in question.

Neo-liberal economic globalisation

Globalisation has many different dimensions but the dominant one is economic. Its main components are:

- Increasingly integrated financial markets, as for foreign exchange, equities and both long and short-term debt.
- The rapid growth of foreign direct investment and an increasing share of global production in the hands of trans-national corporations.
- Increased world trade, which is both cause and consequence of policies to reduce barriers to trade.
- Increasing transfers of technology through trans-national forms, international licensing agreements and joint ventures.
- Increased international movement of people, both legal and illegal.
- The rapidly increasing reach of new forms of communication (Walker and Deacon 2003).

While several of these economic dimensions of globalisation are entirely benign, which emphasises that globalisation *per se* is not necessarily a threat (for example in the promotion of increased trade), it is the nature of the economic globalisation that determines its impact, including its impact on older people. Most economic historians regard the period of *Pax Britannica*

(1820–1914) as the great era of globalisation. One foundation of its rationale was Ricardo's liberal theory of comparative advantage, published in 1817 (Södersten 2004). The present era of economic globalisation, characterised by the integration of financial markets, the spread of transnational corporations and the power of international governmental organisations (IGOs), is however dominated by neo-liberalism. Thus the so-called 'Trans-Atlantic consensus', which in fact spans all oceans, favours a particular form of economic globalisation based on free markets, liberalising trade and reduced public welfare provision. Underlying this model of globalisation are the same neo-liberal assumptions that held sway in the United States under President Reagan and in the United Kingdom under Prime Minister Thatcher. They have also been influential in Australia and New Zealand and, to a varying extent, in European countries (see below).

The 'neo-liberal trans-Atlantic consensus' holds, among other things, that globalisation makes increasing inequality inevitable – global competition means that taxation and social costs have to be minimised, and that job security and traditional public welfare states are not suited to a globalised world in which flexibility is the rule. The economic assumptions underlying this consensus have been demolished by leading economists (e.g. Atkinson 1999), but this has not reduced its policy potency. The fact that, in developed countries, the expanding older population is the main beneficiary of welfare spending has sent pensions, health care and long-term care to the top of the reform agenda and, as this approach to globalisation gains in influence, assisted by the IGOs, questions are being raised about the sustainability of pension and social protection systems, often in the context of a negative commentary on the 'burden' of population ageing (Walker 1990, 2003; Vincent 2003). The impact of *The World Bank* on global pension systems is difficult to over-estimate. With its *International Monetary Fund* (IMF) partner, it has amplified global fears concerning population ageing and pushed pension systems towards the residualisation of public pay-as-you-go schemes – to a minimum role supplemented by an expansion in compulsory, fully-funded and individualised market pensions, with the Chilean pension system as a frequently cited model (World Bank 1994; Ervik 2005). The main architect of the World Bank's policy on pensions has even suggested that the shift to funded pensions helps to mitigate fears of globalisation because it broadens the citizens' perspectives, encouraging them to 'understand the role of, and return to capital' (Holtzmann and Jorgensen 1999). Recently the *World Trade Organisation* (WTO) has joined the World Bank and IMF in promoting private, savings-based pensions, as a way of invigorating financial markets (Estes and Phillipson 2002).

The case for an international political economy of ageing

It is chiefly because of globalisation and the related growth in the power of IGOs and trans-national corporations that an international political economy of ageing is required. The reach and potential power of (neo-liberal) globalisation is massive, though not necessarily as a direct architect of policy but, more often, as the ideological driving force behind economic and social policy. As Rieger and Leibfried (2003: 3) noted, 'governments do not grapple with "globalisation" itself, but with its effects'.

Thus far the influence of economic globalisation on policies affecting older people has been greatest in the developing countries and the Eurasian transition countries of the ex-Soviet bloc (Walker and Deacon 2003). Their financial support from IGOs, mainly World Bank loans, has often been conditional on measures such as trade liberalisation, privatisation and a reduction in the role of the state across a broad front including welfare (*United Nations Research Institute for Social Development* (UNRISD) 2000). In contrast, the picture in developed countries is one in which economic globalisation has had very little discernible impact on policies affecting older people. As far as the world's largest cluster of welfare states is concerned, as well as those countries that devote the highest proportion of their gross domestic product (GDP) to pensions, the *European Union* (EU), there is a fairly strong scientific consensus that globalisation has played no *direct* role in recent social policies (Leibfried and Rieger 1998; Pierson 2000, Södersten 2004; Vobruba 2004). In other words, retrenchment is more a matter of national ideological preference than economic necessity, where the former is moulded by an interpretation of the potential impact of globalisation. This again emphasises the fundamentally important role of IGOs in proselytising neo-liberal economic and social assumptions and prescriptions (Deacon, Hulse and Stubbs 1997; Deacon 2000), including those which directly affect older people (Walker 1990). There is no doubt that these have been highly significant in recent EU pension reforms even if the policies themselves have been dependent on the previous national policy history (Scharpf 1999; Scharpf and Schmidt 2000; Streeck 1999; Daly 2001).

Thus the neo-liberal ideas on which the trans-Atlantic consensus is based have the potential power to undermine established public pension systems. Moreover the same ideas are supporting the liberalisation of public services (including health and social care) under the WTO, and this could also convert national service systems into markets and subject them to competition from international firms (Estes and Phillipson 2002). This would challenge national government prerogatives to provide free services or to subsidise national not-for-profit providers. The threat posed to the long-established welfare state systems of income security in old age are obvious; in the United States, for example, social security accounts for 80 per cent of the income of older people in the lowest two-fifths of the income distribution, and in the United Kingdom, social security (including the public, national insurance pension) provides more than half of the income of all older people. Developing and transition countries, on the other hand, could be prevented from establishing universal pension systems or subsidising the growth of the not-for-profit sector.

While globalisation and the concomitant influence of IGOs and transnational corporations are the main driving force behind the need for an international political economy of ageing, there is also an increasing recognition of the interdependence of nation states. Attempts to create international standards with regard to policies on ageing have been limited. The first major example was the *Vienna International Plan of Action on Ageing* (United Nations Organisation (UNO) 1982). There was no systematic evaluation of the impact of the Vienna Plan, but a retrospective review suggested that it had been useful in raising issues concerning population and individual ageing among policy makers in a wide range of countries (UNO 2001). Twenty years later, the *Madrid International Plan of Action on Ageing* (MIPAA) (UN 2002) was founded on a strong orientation towards global human rights, and it has already been influential in shaping regional policy discussions (see UN Economic and Social Commission for Asia Pacific 2002). The MIPAA can be viewed as contributing to a formative movement calling for the establishment of regional or global social standards in the face of neo-liberal globalisation (Deacon 1999; ILO 2004; but *cf.* Vincent 2005). The UN's *Research Agenda on Ageing for the 21st Century* is a similar expression of global inter-connectedness on behalf of the scientific community.[1] Endeavours such as these suggest the need for gerontological research to reflect the increasingly international character of this field. Specifically there is the interdependence between the global North and South: the fate of older people in developing countries is tied increasingly to the operation of world markets and to the preferences exercised by (ageing) consumers in the developed ones. Some of the demographic ground for such research has been extremely well prepared by Kinsella and colleagues at the US Census Bureau (Kinsella and Velkoff 2001; Kinsella and Phillips 2005).

Elements of an international political economy of ageing

What form might an international political economy take? These notes are intended to suggest the kinds of analyses and research that are needed rather than to represent a comprehensive programme of work. There are eight key elements.

Global inequality in old age

The starting point for an international political economy of ageing should be global inequality. The World Bank estimates that over 70 per cent of the world's older population rely on informal (*i.e.* family) sources of income in old age (HelpAge International 1998). This statistic emphasises two points: most of the world's older population reside in less developed countries,[2] and in many of them the *only* source of material wellbeing in old age is either the individual's own labour or their family (this applies to many countries in sub-Saharan Africa, Asia, including rural China, and parts of South America) (HelpAge International 2004). As in Europe in the past, in many different parts of the world a key factor in the availability of future family support is the current and future level of fertility.

Older people are consistently among the poorest in all countries of the world. Poverty affects a minority of older people in industrial societies, though the variability among them is considerable. In less developed countries, however, the majority of older people experience poverty, and it is especially prevalent and severe among women. Moreover, for most of these older people poverty has been a lifelong experience; their problems of poor diet, lack of work, poor housing and isolation are exacerbated but not necessarily created in old age. Poverty means not only a lack of material resources, which creates malnutrition, ill-health, disability and other forms of deprivation, but also prevents participation in all aspects of life: social, economic, cultural and political. In other words, older people living in poverty suffer from social exclusion that detaches them from, among other things, decision-making processes and thereby reinforces their isolation and insecurity by taking away their ability to change their circumstances. In particular, older people are prevented by poverty and social exclusion from participating in economic life, or are forced to labour in intolerable conditions.

Poverty and social exclusion are persistent problems in even the most advanced welfare systems of the world. In 1998, for example, among people aged 65 or more years in the then 15 member states of the EU, the rate of poverty (defined as 60 per cent of median equivalised income) was less than 10 per cent in only four (Luxembourg, The Netherlands, Finland and Sweden), and the percentage exceeded the EU-15 average (20%) in eight countries, with the UK topping the list with 40 per cent (European Commission 2003). Levels of poverty in old age in some Eastern European transition countries reach four times the EU average (Naegele and Walker

T ABLE 1. *Cost of providing a pension at 40 per cent of* per capita *gross domestic product to people aged 75 or more years*

Country	2000	2025	2050
		Percentages of gross domestic product	
Burkina Faso	0.3	0.4	0.5
Côte d'Ivoire	0.3	0.4	0.7
Ghana	0.7	0.6	1.2
Kenya	0.3	0.4	0.7
Mozambique	0.4	0.5	0.6
Tanzania	0.2	0.4	0.6

Source: Schwarz 2003, Table 1.

2006). It is therefore obvious that combating poverty is a global necessity (Townsend and Gordon 2002). The sheer scale of the problem in less developed countries demands an urgent response from policy makers; as the 2002 MIPAA clearly states, these countries must be the priority for action. In addition, the role of the family and community support has been overstated (HelpAge International 2002). On the one hand, this form of support is not guaranteed and cannot be relied on; on the other hand, rapid social and economic change such as urbanisation and migration, as well as catastrophes such as HIV/AIDS, war and famine, have undermined the capacity of these networks to provide support.

Most of these facts concerning poverty and social exclusion in developing countries are well known, largely through the efforts of the small UN ageing team and organisations such as *HelpAge International*. Poverty and social exclusion are the greatest threats to the wellbeing and independence of older people. Since the mid-1990s, moreover, poverty reduction has been an explicit target of international development. Nonetheless, even as measured by the inhumanely low standard of the proportion of the population with a purchasing power equivalent to less than US $1 per day, there were some 1.1 billion people (one-fifth of humankind) living in absolute poverty in 2000, only a small decrease from the 1.2 billion a decade earlier (World Bank 2004). This slight decline resulted mainly from falls in China and India, while elsewhere the number in absolute poverty grew (especially in Sub-Saharan Africa). Included in this total are 100 million older men and women who lived on less than US $1 per day. One-sixth of the world's population does not have clean water and one-third has inadequate sanitation. At the same time, over the last decade global inequalities grew wider, and they show no sign of abating. An international political economy of ageing must explain why this problem has persisted for so long when, as Table 1 shows, the resources necessary to combat poverty are relatively small.

Development and ageing

A key element of the explanation is the role of development and its impact on older people. In fact, the persistence of poverty and the present impact of globalisation on less developed countries cannot be understood properly without reference to the previous regimes that governed development. In particular, there is the macro-economic orthodoxy that has held sway in development for more than 50 years, which holds that free markets are the most effective way of promoting wellbeing (UNRISD 2000). Underlying this unproven assertion are, again, neo-liberal ideologies that favour private over public funding and assume that the latter is an unproductive burden on the former. It is asserted that stability and economic growth will eventually benefit everyone as the fruits of this growth trickle down to the poor. This questionable theory achieved enormous practical status in the second half of the last century as the Bretton Woods institutions (the IMF and World Bank) applied it to developing countries and, after 1989, to the ex-Soviet bloc. Although, in practice, while free trade was preached to developing countries, its proponents (including the EU and the USA) have used a variety of protective measures to prevent it damaging their internal producers.

The last 50 years have seen a series of international regimes governing policies on development but even those that, briefly during the 1970s, tried to couple redistribution with growth were still characterised by the neo-liberal obsessions with free trade and the size of the public sector (UNRISD 2000). Looking back, the year of the Copenhagen Social Summit, 1995, may be said to be the zenith of the neo-liberal influence in development. Spurred on by the collapse of the Soviet Union, the then Washington Consensus maintained that transitional developing countries had no alternative to free-market restructuring. Yet the very fact that the Social Summit was held reflected widespread discontent with the unnecessary damage caused by the model of development that had held sway for more than 20 years (UNRISD 2000).

The unsustainability of the orthodox model of development is becoming clear to everyone; indeed, the World Bank has itself instigated a *Comprehensive Development Framework*, in which both structural and social concerns are considered in conjunction with aspects of the macro-economy and finance. Furthermore, according to Deacon (2005), there is some evidence that the tide within the Bank is turning away from safety-net minimalism towards universal social welfare provision. It is too soon to assess the impact of this new approach, and the Bank continues to defer to the IMF on macroeconomic and finance matters. Moreover, if the neo-liberal agenda remains overarching it will subvert even the most promising of new starts. This danger can be seen in what is ostensibly a positive policy: the renewed emphasis by the IGOs on poverty alleviation. In practice, the promoted and adopted approach is narrow and remedial, in its targeting of resources to those in greatest need by means of safety-nets (Townsend 2004). This technocratic approach may be partly successful but often at the cost of isolating and stigmatising the beneficiaries. It also fails to address basic income distribution and social equity issues. In turn, as the UNRISD (2000) pointed out, this can become a zero-sum game: providing public benefits for the poorest means reducing them for others, which leads to dual systems of provision and, as the history of social policy shows, services for the poor quickly become poor quality services (Titmuss 1968). In other words, therefore, the neo-liberal orthodoxy undervalues the role of the state at the national level. It focuses on the efficient distribution of scarce external resources rather than on the distribution of all material resources. It has led in transition countries and in many less developed ones to an undermining of state capacity and legitimacy, to such an extent that it is doubtful whether they can cope with the *Comprehensive Development Framework* (Deacon 2000).

Where do older people themselves figure in this story? The answer in a nutshell is that they have been excluded from development. Regardless of which model has been pursued over the last 50 years, older people have not often been regarded as active agents in development and are usually either neglected entirely by those promoting development or are regarded as an impediment to growth (HelpAge International 2000, 2004). This, of course, is a variant on the ageism and age discrimination that is embedded in all societies, especially in less developed countries, but it is having a serious impact on the material wellbeing of older people. International poverty reduction strategies are failing to address the ageing of societies and many national governments are failing to meet the basic needs of older people (this neglect is often legitimised by reference to the myth of universal family support). Older people benefit least of any age group from current development policies and practices (HelpAge International 2000, 2004). Recent examples of this exclusion of older people from global development include the World Bank's (2000/2001) World Development Report, *Attacking Poverty*, which suggested a three-pronged approach: promoting material and economic opportunities, facilitating empowerment, and improving security by reducing vulnerability to external shocks – but with no mention of poverty in old age or, specifically, of the growing numbers of poor older people in less developed countries. Similarly the UNDP (2000) report, *Human Rights for All*, did not mention older people. Even the ILO (2004) *Commission on Globalisation* report, *A Fair Globalisation*, which was highly critical of the current approach, did not mention older people. The tendency for policy makers to focus on young people, in the mistaken belief that older people's needs are being met, has exacerbated this neglect, as has the self-help principle favoured by many development agencies. The challenge, therefore, is to incorporate the issue of material wellbeing in old age in the mainstream development agenda. This urgently requires a strong evidence-base about the relationship between ageing and development (Lloyd-Sherlock 2004).

For decades the global development agenda has either treated social issues as unimportant or ignored them altogether, which represents a major barrier to those seeking to promote wellbeing in old age. Unfortunately no fully developed model gives equal priority to social as to economic issues. The Copenhagen and Geneva Social Summits mapped out the terrain of people-centred sustainable development to try to orientate world development toward greater social responsibility. In particular, they emphasised the essential role of the nation state in promoting wellbeing and individual capacity. What is certain is that the current dominant approach to development is part of the problem and not the solution.

Globalism: the international government organisations

A third element of any international political economy of ageing is the role of IGOs, especially in driving neo-liberal economic globalisation, constructing the crisis of ageing and in promoting neo-liberal inspired social policy responses. One of the great myths perpetuated by IGOs is that free trade and economic globalisation will solve the problem of poverty (Stiglitz 2002). Free trade has failed to eliminate global poverty in the past; why should we believe that it would succeed in the future? Growth rates in the less developed countries were higher in the years of state intervention between 1960 and 1980 than in the free-trade era of 1980–2000 (UNRISD 2000). The cold statistics mask what has been a humanitarian disaster as crude economic theories have been applied without either scientific evidence to support them or measures to protect the most vulnerable from their adverse effects. Adverse they were because, as we have seen, poverty increased in the world's poorest regions and, in all regions, inequalities have deepened (ILO 2004).

Given the sheer scale of global inequality and the depth of the poverty and destitution experienced in some developing countries, even its strongest adherents should question the simple but extremely powerful model that has fuelled global trade for the best part of two centuries, Ricardo's theory of comparative advantage. As shaped by neo-liberal economic globalisation, *by itself* 'comparative advantage' holds little prospect of advancement for the poorest countries. What comparative advantages do the poorest less developed countries hold? Mainly large numbers of workers desperate for work for very low wages, but low wages cannot provide the basis for economic growth nor can they tackle poverty.

What about the growth-led strategies of the East Asian economic tigers? Most of those countries that successfully adopted a low-waged, export-oriented industrialisation strategy in East Asia followed the Japanese model of state-led industrial and economic development, and used massive state intervention to push their economies towards high-wage production, but they did so when there was little competition (Evans 1985; Walker and Wong 2005). Now there is a global glut and low prices in some commodities such as coffee and, effectively, a ceiling on wage increases. Moreover, China has the power to undercut any wage level in the global production system. In other words, economic globalisation based on free trade cannot alone solve the problem of poverty in less developed countries, because poverty both determines low wage production and results from it. In fact, free trade based on specialisation produces benefits that go mainly to the industrialised countries; presumably, that is why they press its virtues so strongly (while, at the same time, protecting their own producers by subsidies, quotas and tariffs). Less developed countries produce mainly agricultural products, at a pittance, for consumption by the rich world. Their production systems and indigenous markets need nurturing, by investment and debt cancellation, before being exposed to global competition. Thus, the goal of development and IGOs should be sustainable livelihoods for all ages (Middleton and O'Keefe 2001).

All this again emphasises the need for a better knowledge-base on which to construct policies and to argue for alternatives. A key element of this research must be the role played by the IGOs in policy formation. Echoing national think-tanks but much more powerfully, the IGOs function like epistemic or knowledge-based expert communities and reveal competing internal perspectives (Stiglitz 2002; Stone 2004). As well as directly intervening, they identify issues, shape the global and national debates, and propose solutions with an authority enhanced by globalisation. A leading example is the huge influence of the World Bank's (1994) report, *Averting the Old Age Crisis*, in setting the pension reform agenda North and South (MacKellar 2000; Ervik 2005). Clearly there is a need for a parallel epistemic scientific community that, among other things, contests the dominant global narrative that portrays ageing as a burden and marginalises older people in development.

Trans-national corporations

The growth in the power and influence of trans-national corporations is an important aspect of international political economy. Trans-national corporations directly employ some 73 million people and are indirectly responsible for as many workers in their affiliated or subsidiary companies (United Nations Centre for Trade and Development 1994; Madeley 1999). They control one-third of world output, four-fifths of global investment, and two-thirds of world trade. While the global reach and influence of these corporations have often been exaggerated, there can be no doubt about the importance of either intra-firm or inter-firm collaborative networks (Yeates 2001), or about the increasing importance of these corporations in the health and personal care sectors. Similarly, there is little doubt about the power of the corporations controlling pension funds, particularly in the Anglo-Saxon countries (Blackburn 2002).

What is required urgently is social gerontology research that examines the precise implications of these corporations for ageing and older people. To what extent do their business interests over-ride the national institutions of representative democracy through which older people's perspectives might be voiced? Such analyses must include the growing influence of the pharmaceutical giants in influencing national responses to ageing, including their research agenda; the similarly rising global importance of US-based health and social care corporations; the power of multi-national food conglomerates; the impact of international plant relocation on local communities; low wages as drivers of poverty; and the power of 'grey capitalism' to determine the living standards of older people without any reference to those concerned (Blackburn 2002).

The nation state in a globalised world

The role of the state remains central to political economy, even at the international level (Pierson and Leibfried 1995; Yeates 2001; Rieger and Leibfried 2003). It is frequently claimed that globalisation undermines the power of the state but the evidence, so far at least, is that states in the developed world remain the key sources of policy and that these, including retrenchment, are path-dependent (Pierson and Leibfried 1995; Scharpf 1999; Scharpf and Schmidt 2000; Streeck 1999). As noted above, however, neo-liberalism undermines the role of the state, including as a provider and funder of incomes and services to older people, which means that it simultaneously endangers macro inter-generational solidarity. All over the world, the public sector has been weakened, in some cases drastically so, by policies based on the neo-liberal assumption that it is an unproductive burden on the private sector. Yet history teaches that economic

TABLE 2. *Approaches to old age security in a global perspective*

	Formal			Informal
Dimension	Public	Occupational	Personal savings	Extended family
Legal status	Mandatory	Voluntary or mandatory	Voluntary or mandatory	Voluntary or mandatory
Benefits	Defined benefits	Mixed	Defined contributions	–
Funding	PAYG	Mixed	Funded	Mixed
Public/private	Public	Private	Public or private	Private
Examples	OECD Latin America China (urban)	Australia Brazil France The Netherlands Switzerland	Chile Malaysia Singapore USA	Most of Africa and Asia China (rural)

Note: PAYG: pay-as-you-go.
Source: Adapted from World Bank 1994: 97.

security in old age cannot be guaranteed by private markets. In the contemporary world, too, the evidence points clearly to the critical role of the public sector in promoting wellbeing. This was the conclusion of a review of the positive experiences that combined economic growth with conscious social development in Botswana, Mauritius, Kerala (India), Sri Lanka, The Republic of Korea, Uruguay, Malaysia, Barbados, Costa Rica and Cuba. Mauritius and Botswana introduced universal pension entitlements and Uruguay and Costa Rica reformed their pay-as-you-go systems without full privatisation. The key ingredients to successful social development appear to be responsive governance, socially-friendly economic policies, and the universal provisioning of social services. In all these endeavours the role of government is central (Chen and Desai 1997: 432). Private markets can play an important part in social protection systems, but if they become dominant, the likely result is insecurity and social exclusion.

The international economic agencies, notably the *Organisation for Economic Cooperation and Development* (OECD), have been examining the sustainability of pension systems for decades and it is clear that no single model is appropriate for all countries. It is everywhere apparent, however, that inter-generational solidarity is the basis of material wellbeing. As Table 2 shows, approaches to old age security across the world depend to a greater or lesser extent on risk pooling. In less developed countries, it is common for such risks to be pooled within families and for redistribution to occur across generations. In other words, these countries lack societal institutions for risk pooling. In most developed countries,

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welfare state systems provide the mechanisms to pool risks and to transfer resources between generations. This is also the case for countries in transition that have established welfare systems or are in the process of (re-)building them. Even in those countries that rely to a great extent on personal savings, there is still an important element of redistribution between generations (the US case has already been quoted).

The Bretton Woods institutions and Northern aid donors have not learnt the lessons from the building of the European welfare states, in which inter-class and inter-generational solidarity proved critical (Walker 2003). By focusing on the very poorest, they have encouraged the urban middle class to desert the public sector and to seek health and social care and pensions in the private market. This, in turn, has prevented the creation of universal social protection systems and has residualised the public sector (Deacon 1999; UNRISD 2000). Thus, the destruction of public services for the middle classes in the developing welfare states of Latin America, South Asia and Africa, in the name of meeting the needs of the poorest, has weakened the basis for solidarity in these premature welfare systems. The problem was one of inequity in distribution within these systems, which favoured the elite, not the principle of solidarity. In the Eurasian transition countries there has been a loss of confidence in the public sector, encouraged not only by the World Bank and IMF but also the EU (Ferge 2002).

While neo-liberal globalisation tends to polarise society and weaken the basis for solidarity, national systems of income protection in old age require public institutions that promote the values of equity and social cohesion. Above all this calls out for strong public (including not-for-profit) institutions and a renewal of commitment to the public good. The 'social' has to be reinvented (Beck, van der Maessen and Walker 1997). This is a tall order in many developing countries, where national and international non-governmental organisations (NGOs) have a crucial role to play in helping to build administrative capacity. Research is important, too, especially in generating a sound evidence-base on the impact of different forms of social protection on older people in less developed countries.

Supra-national regional structures

The power and potential power of supra-national regional organisations is an increasingly important aspect of an international political economy of ageing. Regional structures such as the *North American Free Trade Agreement* (NAFTA), the *Association of South-East Asian Nations* (ASEAN) and the *Asia-Pacific Economic Co-generation Forum* (APEC) are primarily trading blocs, as was originally the EU (still known as the 'Common Market').

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The EU has combined successfully a regional economic policy with a regional social agenda; the latter has recently focused strongly on pensions (emphasising adequacy as well as sustainability) (Naegele and Walker 2006). This approach could be considered by the southern trading groups such as *Mercado Común del Sur* [Southern Core Common Market] (MERCOSUR) and ASEAN (Deacon 1999). Critically, however, the EU's development policy is now seen as part of the problem by the developing countries. If the EU increased its support for North-to-South transfers and opened its borders to trade, it could become part of the solution. The EU demonstrates both that globalisation does not have to lead to the residualisation and the privatisation of social protection and that universal redistributive welfare states are sustainable in the face of global competition (Gough 1997; Vobruba 2001; European Commission 2004). But even in the EU, there is a constant battle between the economic and social dimensions and, as usual, the economic one prevails (Ferge 2002). There are likely to be important lessons to be learnt from previous failed attempts to establish blocs to resist IMF hegemony (such as LAFTA).

The United Nations Organisation

The UNO is treated separately from IGOs in this proposed agenda because its remit and those of its constituent organisations, such as the *World Health Organisation* (WHO), are broader and crucially include a human rights dimension. As one example, the *International Labour Organisation*'s (ILO) approach to pension reform contrasts sharply with that of *The World Bank* (Ervik 2005). Although the inadequacy of the UNO's resources is readily criticised, especially the tiny amount devoted to ageing and older people, it is 'the only game in town' with regard to progressive global social policy. The UNO and its organisations head a series of global initiatives that aim for universal public provision and equitable social policy in less developed countries. Examples include a programme on social policy in a development context, which focuses on 'active social policies'; a 2001 report on social protection that was a major step forward in articulating a UNO's social policy; the ILO's work towards new forms of universal social protection, of particular importance in less developed countries where work-based social security schemes have very limited coverage; the *Commission of Human Rights* increasing focus on economic, cultural and social rights; a 2004 high-level meeting on 'Finance for Development'; and the follow-up work from Geneva 2000 by the *Social Policy and Social Development Secretariat*, including the codification of UN social policy. Unfortunately older people continue to be either absent from or marginalised in the agenda and it is vital that there is an ageing dimension. Ageing should be mainstreamed within the UNO as gender has been.

The few positive signs of political momentum behind the case for a socially responsible globalisation have invariably stemmed from UNO initiatives, *e.g.* the 2000 Millennium Summit commitment by world leaders to halve extreme poverty by 2015; the 2002 'International Conference on Financing for Development' in Mexico, at which the EU and USA announced significant aid increases (but still most rich countries are far behind the UNO target of 0.7 per cent of national income, the average national contribution being half this figure), and the Johannesburg 'World Summit on Sustainable Development'. The WHO's attempt to create a broad perspective on ageing is important too (WHO 2002). Of potentially greatest long-term importance to older people is the 2002 *Madrid International Plan of Action on Ageing* (MIPAA).

There is not space to dwell in detail on the MIPAA but it does provide a template not only to plan the mainstreaming of ageing in national development policies but also to monitor their implementation. Of course, all such international documents may be criticised in some respects and all of them represent compromises. Nonetheless the MIPAA commands widespread official support in both the more developed and less developed worlds. The core concept of the MIPAA, *a society for all ages*, which derived from the 1995 'World Summit for Social Development', is interpreted through 10 foundation themes that underpin the whole document: human rights; a secure old age (including the eradication of poverty); the empowerment of older people; individual development, self-fulfilment and wellbeing across the lifecourse; gender equality; inter-generational inter-dependence, solidarity and reciprocity; health care, support and social protection; partnership between all major stakeholders in the implementation process; scientific research and expertise; and the situation of ethnic minorities. It has three priority directions: older people and development; advancing health and wellbeing into old age; and ensuring enabling and supportive environments; and 19 priority issues, 35 objectives and 239 recommendations for action. While addressing the challenges and opportunities of global ageing, the MIPAA clearly focuses on developing countries.

The passage in the MIPAA concerning implementation and monitoring was however substantially diluted in the political process prior to and in Madrid (Sidorenko and Walker 2004). A question, therefore, hangs over this document like all similar ones: can they make a difference to older people's lives, especially in less developed countries? While maintaining a critical perspective, there are two reasons why the MIPAA is important. First, it evinces that governments take seriously such documents, *e.g.* in the Asia-Pacific, the most rapidly ageing region in the world, the MIPAA has spurred the 1999 'Macao Plan of Action' as a platform for regional co-operation of the kind envisaged by the MIPAA. An Asia-Pacific regional implementation strategy was agreed in October 2002 following the Madrid summit. The UNO *Economic and Social Commission for Asia and the Pacific* (UNESCAP) regional survey showed that progress was being made but that barriers still existed. There are of course major national differences in the level of public policy development and infrastructures available to implement such policies as well as in their demography. The more developed countries in the region, such as Australia, Japan and New Zealand, which have been faced with ageing populations for longer, have long-established, high-level, government agencies that can co-ordinate resources to respond to population ageing. The UNESCAP (2002) survey showed consistent progress with regard to the sorts of recommendations made by the MIPAA, at least among the 52 per cent of the nations that responded.

While there is evidence from one region that international plans such as the MIPAA are taken seriously by some governments, there is no evidence whatsoever that they transform the political economy of approaches to ageing nor that they have the power to influence the dominant form of economic globalisation. Nonetheless, they can raise the profile of ageing in the national policy arena and encourage regional and sub-regional collaboration, *e.g.* the UNESCAP (2002) survey showed that 70 per cent of countries in Asia-Pacific had participated in activities related to ageing and inter-country exchanges of information.

The second reason why MIPAA is important is that because governments take notice of such documents, they can become important points of reference for global, regional and national campaigns. The MIPAA is a key reference point for international non-governmental organisations (INGOs), such as the *International Federation on Ag*eing (IFA) and *Help Age International* (in the latter case with regard to both international campaigns and in its dialogue with the UK *Department for International Development*). So far there are no signs that local action groups of older people have seen the campaigning potential of the MIPAA. Although its main impetus is towards less developed countries, it contains much of use to pensioners in more developed nations. This requires the predominant grass roots form of the politics of old age to adjust to the global sources of pressure on pensions and health-care systems. It needs to be realised that the members of national groups, such as the UK *National Pensioners' Convention*, have causes in common with the less organised older people of sub-Saharan Africa and parts of Asia-Pacific.

In other words there is a gap, or perhaps a structural lag, between the new macro-politics of ageing and the micro- and meso-forms of political consciousness and collective action (Riley, Kahn and Foner 1994; Walker 2005*b*). These issues are under-researched globally and, in particular, there is insufficient collaboration and knowledge-sharing between North and South.

International non-governmental organisations

The final core element of an international political economy of ageing is the role of INGOs. As with national NGOs, there are two important dimensions to the required analyses, the INGOs' roles as service providers and as advocates for policy change. Because of the absence of both service infrastructures and representative democracy in developing countries, the work of INGOs is often vital. The political economy of such global not-for-profit organisations is not well developed, however, and there are few comparative evaluations of their activities on the ground. Nor has there been sufficient research on their relationship to indigenous NGOs (Middleton and O'Keefe 2001).

Conclusions

This article has begun to map the terrain of an international political economy of ageing. It has argued that such a focus is necessary because of the influence and potential influence of globalisation and global institutions on older people's everyday lives. Implicit within this case is an argument for increased research attention to ageing in less developed countries. The map is by no means complete because it does not contain important extant research, as on trans-national communities and the political economy of demography (Phillipson and Ahmed 2004; Vincent 2005). Adopting a political economy perspective assumes that all the critical cross-cutting dimensions of analysis are employed to track the impact of international developments, such as globalisation, especially age, social class, gender and ethnicity. An international political economy of ageing is needed to understand current national and global responses to ageing; to highlight the roles of trans-national corporations and IGOs; to evaluate critically globalisation and its responses as they affect older people; to counteract the ideology of the 'ageing crisis'; and to combine agendas that have existed for too long in separate pigeon-holes: human rights, development and ageing.

The article includes specific suggestions for research that will develop the international political economy perspective. These include the priority to explain the persistence of poverty in less developed countries and its deep impact on older people; analyses of the interaction between development and population ageing and the creation of new models which integrate the two, and which therefore provide older people with a more central role; and close investigation of the roles of IGOs in policy formation in the ageing field and of the myriad influences of trans-national corporations. Others will formulate alternative agendas, but the main point is for researchers to address the question of population ageing from an international political economy perspective. This is not a plea for it to be dominant; the social gerontological imagination, adopting Mills's (1959) phrase, should be informed by an understanding of the contribution of the international political economy both to the personal and the public issues of ageing.

It is also important not to confine an international political economy solely to social gerontology, indeed it is time to join up a wide range of disciplines in the social sciences and beyond. While social gerontology brings a distinctive perspective on ageing to the envisaged multi-disciplinary table, because of the demographic changes afoot in all societies, it should be a more central understanding in other disciplines. At the same time, social gerontology needs to draw from a wide range of other perspectives if it is to understand the new dynamics of ageing, including the changing circumstances under which older people live. In particular, the international political economy perspective is increasingly essential, for in all countries social policies vital to the lives of current and future older people (in employment, pensions, health, social care, housing and so on) are being determined by neo-liberal ideas promoted by IGOs and introduced with reference to global competition.

As this article has emphasised, the 'social' is being supplanted by the 'private and individual' in many areas of social policy that affect older people and responses to societal ageing. The causes have been traced to the purposeful spread of a neo-liberal hegemony in which key players in the international political economy have been highly influential. What can social gerontology do in the face of these global forces? First, it is important for the discipline to contribute to international efforts to create regional and global social standards. Second, international alliances between researchers in the rich North and the poor South would help to develop social gerontological resources where they will be badly needed in the coming decades. Third, social gerontologists have a major role to play in making the case, to governments, local authorities, NGOs and pensioners action groups, that the social is as important as the economic in determining the quality of older people's lives and that older people are highly committed to their local communities no matter how deprived they may be (Gabriel and Bowling 2004; Scharf, Phillipson and Smith 2004). In other words, economic growth alone cannot generate happiness. This message is as important in less developed countries as it is in the developed ones. It is time for social gerontology to take centre stage in the argument against neoliberal globalisation.

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NOTES

1 The *Research Agenda* is available online at http://www.un.org/esa/socdev/ageing/ageraa.htm
2 In 2000, 61 per cent of the world's population aged 60 or more years lived in less developed countries, and the percentage will rise to 70 per cent by 2025.

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