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# Social inclusion in an ageing world: introduction to the special issue

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***ABSTRACT***
This paper provides an introduction to a special issue focusing on diverse examples of policy practice in social inclusion and ageing across different regions of the world. These examples illustrate the multifaceted nature of the concept of social inclusion, and how it is applied in the context of global demographic ageing. The paper begins with an exploration of the history and development of the concept of social inclusion, as applied to ageing policy, and how the concept has emerged following its initial association with economic disadvantage. Now commonly defined as relating to social participation in key activities of the society in which people live, a social inclusionary approach highlights the risks of social exclusion and isolation faced by older people. Social inclusion thus incorporates core issues in ageing such as civil engagement, an ageing workforce, age-friendly communities, and civic involvement. There are some particular challenges to implementing social inclusion policies within the current environment, which are addressed within this special issue, and these include the impact of social and cultural change, particularly across some of the East Asian countries, and the impact of global financial crises on work and retirement.

***KEY WORDS***– social inclusion, older people, ageing policy, social participation, intergenerational, global.

This special issue had its origins at a Symposium held in November 2008, which was hosted by the City University of Hong Kong. This Symposium brought together an international group of researchers to explore a range of themes under the banner of *Social Capital and Volunteering in Modern Ageing Cities: Building Intergenerational Inclusion*. The intent was to explore some of the most pressing and challenging social issues confronting modern life in both East and West. The extent and nature of social exclusion has been, and remains, a significant issue across many modern societies. This includes

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those societies in economically developed countries where population ageing and increased longevity have been established demographic trends for several decades, but also those in many economically developing countries that are currently ageing at an unprecedented speed and scale.

Traditionally, research on ageing has been concerned with physical health and cognitive functioning; topics that are both important in their own right and have particular resonance for older people and those who are physically frail. However, this restricted focus has led to the unfortunate neglect of social aspects of ageing and their contribution to the quality of life as people age. Concepts such as *generativity* (Erikson 1963) and *engagement with life* (Rowe and Kahn 1998) have been instrumental in reinstating the social dimension as a component of research about ageing and policy formulation. Such notions offer a more optimistic prospect for the development of positive conceptions of ageing than concepts such as 'old age's roleless role' (Burgess 1960). In a similar fashion, social inclusion, and its counterpart social exclusion, has emerged as another significant area of research and policy development that has brought into sharp focus the social nature of ageing.

In his lead article for the inaugural issue of *Ageing & Society*, Peter Townsend outlined an agenda for research and policy to promote social inclusion, then referred to as 'integrating elderly people into society', of which the main tasks were to counter the *socially* manufactured dependency of elders resulting from the 'imposition, and acceptance, of earlier retirement; the legitimation of low income; the denial of rights to self-determination in institutions; and the construction of community services for recipients assumed to be predominantly passive' (Townsend 1981: 5). These various aspects of the structured dependency of many elders, along with their social isolation and psychological loneliness so vividly portrayed in Townsend's earlier work (*e.g.* Townsend 1957), have since defined much of the field of social inclusion/exclusion. Following in the Townsend tradition, poverty and associated multiple deprivations of basic necessities and public services have become the core of social inclusion/exclusion research (Pantazis, Gordon and Levitas 2006). To this core the restricted access to social participation resulting from poverty and ageist discrimination have also become central themes. Townsend's work has also been influential in the development of professional responses by human service professionals such as social workers to the provision of care and support for older people.

Over the past 30 years, the expansion of the focus of research and policy from poverty *per se* to social exclusion more generally has broadened the understanding of not only economic, but also political and social forces that have affected older adults and their integration in society (Walker and Walker 1997). The volunteerism movement has also contributed to this

expansion (Warburton and McDonald 2009). However, it has become of increasing concern that opportunities for the social inclusion of older people are under severe challenge as a result of economic pressures both through demographic changes (population ageing) and the structural instability in the global financial system. At this historical junction, it is worthwhile taking stock of the past and envision the future concerning the social inclusion of older adults.

The aims that underpin this special issue are to explore issues of social inclusion and exclusion, as many countries across the globe seek to come to grips with such phenomena. As far back as 1991, the United Nations, through the statement *Principles for Older Persons*, urged its member states to give due recognition to inclusion for older people with regard to work, retirement decisions, education and training, residential arrangements, community and volunteering services, as well as participation in (political) movements and associations. Over the past two decades, social inclusion/exclusion has become recognised as a key public policy goal across western countries, particularly in the European Union (EU) (Berkel and Møller 2002) and increasingly in developing countries, such as China (Li 2004). When applied to older people, social inclusion as an idea has been concerned with optimising their opportunities to have meaningful relationships and roles in society despite (or because of) their age. Yet how this could be achieved in both policy and practice is open to interpretation; especially as in many societies there has been a general lack of political will to achieve real change.

In the introduction to this special issue, *Social Inclusion in an Ageing World*, we have sketched a conceptual and theoretical analysis of the social inclusion/exclusion of older people by drawing on our respective areas of expertise (social psychology, ageing policy, social work) and geographical knowledge (Asia, Australia, United Kingdom (UK)/Europe). We begin with an exploration of the concept of social inclusion with respect to older people and have addressed some key dimensions. We then introduce the five articles that comprise this special issue, focusing on their different contexts and relationship with social inclusion.

## Social inclusion

The concept of *social exclusion* first emerged in France during the 1960s, although it only became a core concept in policy following a close association with social disadvantage during the 1980 economic crisis (Silver 1994). From this time, the discourse of social exclusion spread rapidly across Europe and to North America (Silver and Miller 2002). In the contemporary

context, the promotion of social inclusion or redress of social exclusion has become a key policy driver in many western societies. This includes countries in the European Union (Byrne 2005), including the UK (Hoff 2008; McDevitt 2003; Social Exclusion Unit 2006), Northern America (Boushey *et al.* 2007; Guildford 2000) and Australia (Lui *et al.* 2011). Yet by contrast, government in the United States of America (USA) has not been enthusiastic in the adoption of such policies (Moffatt and Glasgow 2009).

Social inclusion has been defined as a process to ensure that everyone, regardless of their life experiences or circumstances, can achieve their potential in life (Social Exclusion Unit 2006). This definition has highlighted important concepts that are central to the notion of social inclusion such as equality, rights and social cohesion and draws attention to barriers or inequalities that prevent individuals or groups from taking a full role in society. Hence social inclusion is a dynamic concept, which represents both an outcome and an array of social processes that are rooted in different conceptions of social integration and citizenship (Byrne 2005; Lui *et al.* 2011).

In a similar vein, Burchardt, Le Grand and Piachaud (2002) have offered a working definition of 'social exclusion', suggesting that 'an individual is socially excluded if he or she does not participate in key activities of the society in which he or she lives'. They identify four domains in which people may be socially excluded: consumption (the capacity to purchase goods and services), production (or participation in economically or socially valuable activities), political engagement (or involvement in local or national decision-making) and social interaction (integration with family, friends and the community generally). Barry (2002) argued that issues of social exclusion can occur regardless of whether an individual or group *wishes* to participate or not, as individuals may choose not to participate as a result of past discrimination or exclusion. This view has particular implications for older people who may be socially excluded as a result of negative past experience, particularly in the paid workforce. Social exclusion should be understood within the context of a particular society. For example, at a more subtle level, elders, in some societies where multi-generational households are usual, being considerate of the housing burden borne by their married children raising their own families, may opt to live on their own and consequently let go a certain measure of family integration. This form of *altruistic* social exclusion raises interesting questions for intergenerational solidarity and housing policy (see paper by Du, this issue).

The notion of exclusion carries with it the imperative of social inclusion, which provides a practical policy response to social exclusion. Thus, a social inclusion approach encompasses the facilitation of participation of

individuals or social groups across the four key domains identified by Burchardt, Le Grand and Piachaud (2002).

It should be noted, however, that there are debates and critiques associated with both the concept and the efficacy of adopting a social inclusion approach (Askonas and Stewart 2000). Some have suggested, for example, that it channels attention away from initiatives that deal with poverty directly; or that it individualises problems or stigmatises social groups (Béland 2007; Spandler 2007). Further, as with poverty and disadvantage, measurement of the extent or individual experience of social exclusion remains an imprecise science. The fact that social exclusion has been recognised as a policy driver in some major modern societies is a cause for hope that if it cannot be eradicated the impact can be mitigated.

## Social inclusion and ageing

A social inclusion approach has been used in many societies to tackle a broad range of social problems, such as poverty, unemployment and housing. In recent years, in a number of European countries and increasingly in China, this approach has been used as recognition of the risks of social exclusion and isolation faced by older people (Ogg 2005; Victor, Scambler and Bond 2008). The UK Social Exclusion Unit (2006) notes these risks are particularly evident for three main reasons. First, people who are socially excluded earlier in life will usually experience further exclusion when they age. Second, key events associated with later life such as retirement or widowhood can result in social exclusion. Third, age discrimination and ageism can intensify the marginalisation of older people. The work of researchers such as Phillipson, Scharf and their colleagues have also identified neighbourhood characteristics and location as major causes of social exclusion for older people (Phillipson and Scharf 2004; Scharf, Phillipson and Smith 2005). According to results from the first wave of the English Longitudinal Study of Ageing, multiple exclusion has been found to occur in later life as a result of social conditions such as living alone, having poor housing, particularly those in rental accommodation, few available transport options, low income or dependency on welfare benefits (Barnes *et al.* 2006).

Lui *et al.* (2011) have identified particular issues associated with the implementation of a social inclusion approach to ageing in western countries such as Australia. These issues include economic deprivation associated with ageing and retirement, making the process of social exclusion far less dynamic (Phillipson and Scharf 2004). This is particularly the case in times of financial crises, which impact far more on older people

who are unable to continue paid work and hence accumulate savings and income.

A second major consideration is cumulative disadvantage, particularly the long-term impact of social exclusion on social groups such as women, indigenous people, migrants and those from disadvantaged areas (for further details, *see* Lui *et al.* 2011). Issues such as gender, ethnicity and socio-economic disadvantage can impact significantly on experiences in later life, with these groups struggling to deal with social exclusion across the lifecourse.

A third consideration, prompted by baby-boomers coming of age, is the need to recognise the increasingly diverse composition of the social category called 'old people' (Neugarten 1974). The arrival of the *young-olds*, who are highly educated and still robust in physical health and psycho-social functioning, has been responsible in part for legislative reform directed against ageist discrimination in retirement in a number of western countries (*e.g.* Ireland – *Employment Equality Act 1998*; Finland – *Non-Discrimination Act 2004*; UK – *Equality Act 2010*). Whilst such legislative developments are evidence of a step forward in challenging social inclusion, they raise concern among younger generations apprehensive of their career being blocked by older workers who, in their opinion, should have stepped aside sooner rather later. Such zero-sum mentality underlines much of ageism in the competition for scarce resources, as the young fear for their future (Nelson 2005). Social inclusion of the one means exclusion of the other, and such social psychological perception, to the extent that it is widely shared in society, threatens the very notion of social inclusion for all (Nelson 2005).

Given the variability among older people, the needs of young-olds, old-olds and the frail aged are different, as are their respective barriers to social inclusion. At the risk of over-simplification, the primary barrier for young-olds is perceived competition for jobs (Brooke and Taylor 2005), that of old-olds is the stigma of being a burden on society (Victor 1987), whilst the frail aged have to face considerable financial costs of long-term care in addition to social distancing as the public shun them (Kurzban and Leary 2001). Ageist stereotypes such as these and ageism more generally are powerful psychological barriers to elderly social inclusion (Nelson 2004; Ng 1998).

## Social participation

Social participation and civil engagement, including volunteering, are important dimensions of social inclusion for older people across different social welfare regimes (Warburton and Jeppsson Grassman 2011). Similarly, these issues have emerged in importance in many Asian countries, where

globalisation and population movement has led to the creation of new social roles. In an Asian context, it is argued that volunteering can provide new role identities for older people in an era when cultural erosion is challenging their traditional role within the family (Warburton and Winterton 2010).

These approaches are consistent with new conceptual approaches to ageing, which recognise important variability of function and capability among older people and attempt to move away from sole attention on frailty and poor health, towards a focus on active and continued involvement in society. However, positive opportunities require active creation to encourage the social involvement of older people, which suggests that social inclusionary policies need to focus on the encouragement and development of these opportunities. Ageing programmes need to break away from a focus on economic productivity alone, as in the Australian government's focus on 'encouraging' older people to remain in paid work through a lifting of pensionable age (Lui *et al.* 2011). Instead, policy and practice could focus on the promotion of local social integration and participation, for example through volunteering and community service (McBride 2006). To reduce ageist assumptions that older people do not contribute to society, it is important instead to promote both their involvement and the visibility of that involvment (Warburton and McLaughlin 2005).

How to achieve this in policy and practice remains a challenge. The United Nations and World Health Organisation (WHO) have played a critical role in setting directions for future policy by articulating key principles as guides to pave the way for a more inclusive approach to older people. The WHO (2002), for example, has identified health, independence and security of older people as the three pillars that support active ageing. Walker (2002), building on this approach, suggested seven key principles for the creation of an active ageing strategy. These include: developing meaningful pursuits outside paid work; encompassing all older people, whatever their health or social status; a lifecourse approach, exploring preventive strategies; intergenerational solidarity; balance between rights and obligations; balance between policy-led initiatives and citizenship action; and respect for diversity. These principles provide an excellent starting point for the challenges of addressing social exclusion for older people.

A note of caution, however, is in order. The notion of active ageing and its association with volunteerism and caring can backfire when it places unrealistic social expectations on older people that lead to burnout (Snyder, Omoto and Lindsay 2004). As the debate between social disengagement and activity theories has shown, it is adaptive continuity (Atchley 1999) that is developmentally more congenial to ageing than unabated activity

or wholesale social withdrawal. In Chinese societies and others that put high value on the family, volunteerism is a poor substitute for grandparenting and other familial roles such as generativity in fulfilling life-long goals held by older adults (Ng *et al.* 2011). The apparent decline in family structure and function do put these life-long goals beyond reach for many older adults even in these countries. However, the decline is not irreversible. Strengthening the family and intergenerational solidarity are thinkable policy platforms that will benefit from multi-disciplinary and cross-cultural research (Hoff 2008).

## Social inclusion in an ageing world

In this special issue some of these issues are discussed in a global context. More specifically, the issue provides an explicit critique of core concepts associated with social inclusion, through multi-faceted exploration. There is no consistent approach to the measurement of social inclusion and no agreed set of social indicators. Similarly, there is perhaps little agreement in what is meant by the social inclusion of older people and whether this notion refers to broader inclusive processes or to ensuring inclusion in paid work or participation in civil society. The exclusion of older adults from paid work has long been a concern in social gerontology and is closely related to the study of poverty and ageist barriers in the workplace.

In this special issue, Taylor and his colleagues explore some of these paid work issues, in particular by focusing on the attitudes found among Australian employers to an ageing workforce. Other articles focus on dimensions of social participation, with Scharlach and Lehning, for example, discussing social inclusion in the USA in relation to ageing-friendly communities and participation, and Du exploring intergenerational issues and family support in China.

This special issue provides a cross-national dimension, in so doing it recognises that there are important differences across countries in their approach to the social inclusion of older people. In particular, there is a strong focus on the situation in the developing countries of East Asian. Mention has been made that although social inclusion/exclusion has become recognised as a key ageing policy goal in Europe, it has only recently emerged in the developing countries of East Asia. As such, the notion deserves a full exposition especially in view of the global financial crisis (McCord 2010). The development in China is particularly noteworthy for the insight it sheds on ageing policy in this populous country that has been undergoing rapid and sweeping demographic, economic and social changes since the 1980s.

As well as Du's analysis of social inclusion in China, Cheung and Leung analyse issues of social cohesion in Hong Kong. This special issue has been assembled at a time of extreme social and cultural change. As noted in the articles presented in the Asian context, globalisation continues to have a fundamental impact on the traditions associated with ageing, particularly notions of filial piety, as discussed in the articles by Du. Whereas the exclusion of older people in Western developed countries, however serious or alarming, affects only a minority of the older population, in China it affects the majority of the older population, especially those in rural areas. This fundamental difference is closely related to the Chinese government's dislike of the concept of social exclusion (社會排斥 *shehui paichi*) because of its anti-socialist contradictions (Li 2004). How, then, do Chinese authorities and researchers address the fact of social exclusion of older people and what progress has been made in policy and practice? These questions and associated issues have been addressed by Du in the special issue, whose contribution has extended his earlier work on the general topic of population ageing in China (Du and Guo 2000) to a more focused discussion of the most recent research into policies relating to Chinese social inclusion/exclusion.

Consideration of social inclusion/exclusion and ageing in China has broader ramifications, particularly in the light of an ambitious comparative project, which was dedicated to find out what European ageing policy could learn from the East (Doling, Finer and Maltby 2005). In this study, some of the Asian countries which are affected by a mix of traditional and modern influences are compared, with countries such as Taiwan, South Korea and Japan compared with Malaysia, Singapore and Hong Kong, which have had a common British colonial experience. Du's paper needs to be seen within this comparative framework, particularly relating to the issue of elderly support in social inclusion and how such support may be safeguarded by shared responsibilities between family and state or a modern sense of filial piety. In this way, findings extend earlier works on these and related issues (Liu *et al.* 2000; Ng *et al.* 1998). In Chinese societies, respect for old age often goes hand in hand with its affirmation and acceptance, instead of its denial or replacement by wishful 'agelessness' or unrealistic 'age equality' that are intended to confront ageist discrimination but may actually contribute to the marginalisation of older people (Duncan 2008; Ng and McCreanor 1999).

As well as social and cultural change impacting on China, other papers in the special issue explore contemporary change in East Asian countries, in this case, the economic crisis which has given social inclusion new meaning and significance since the near collapse of the global banking system in recent years. This economic crisis, euphemistically called the 'credit crunch' in Europe but metaphorically compared to a 'financial tsunami' in Asia, has

affected not only jobs but also savings as well as future retirement provisions. Poverty is no longer a concern just for the very poor, but has been writ large, affecting the middle class as well. For example, those who might have previously felt secure financially regarding their retirement plans and post-retirement life, are now finding it necessary to re-evaluate their plans for later life. Many, including baby-boomers who are now entering older adulthood, are finding it necessary to stay on in the workforce and compete with younger workers for employment. Would employers want to hire them? Would governments, as Walker (2009) has observed, still have the resources to alleviate poverty and protect retirement provisions after using massive sums of public money to bale out banks?

Two articles in the special issue, by Cheung and Leung and by Taylor *et al.*, address these and related issues, using data from Hong Kong and Australia, respectively. Although Australia and Hong Kong are not immune to the global banking crisis, they have been recovering speedily in ways that may offer interesting points for comparison concerning ageing and social inclusion in a modern world marked by increasing economic globalisation.

In Hong Kong, for example, Cheung and Leung report results showing that social cohesion was perceived to have mitigated the negative impact of the financial tsunami. The Australian context, as described by Taylor *et al.*, presents a picture of sustained economic growth and concurrent concerns about labour shortages. Within this context, the issue becomes how to manage labour supply, and whether this will result in a strong market pull on older workers. The authors draw on a large survey of employers from one Australian state to assess the reactions and responses of employing organisations to workforce ageing, and the implementation of workplace labour supply strategies. Their findings provide new evidence that employers are demonstrating an interest in utilising older workers, and intend to actively involve them through implementing flexible work options. This suggests a positive way forward for older workers, seeking to balance the work–retirement nexus, as well as indications that the ageing labour force may help build the foundations of a more sustained, lifelong approach to social inclusion in later life.

Two other papers in the collection have focused on the importance of place and community to social inclusion as people age. These papers have drawn on theory emanating from environmental gerontology, expounded by authors such as Andrews (Andrews *et al.* 2009) and Wahl and Weisman (2003). This theoretical approach has applied a multidisciplinary focus to the relationship between older people and their socio-spatial surroundings. Current research evidence suggests that wellbeing in later life is closely related to physical environment. The article by Buffel and her colleagues focuses on the neighbourhood dimension of social exclusion across two

countries, Belgium and England. In this context, place-related theory suggests that place can promote wellbeing and attachment for older people and offer security in times of change (Peace, Holland and Kellaher 2006; Wiles *et al.* 2009). This body of research has focused on ageing in both urban contexts (*e.g.* Scharf, Phillipson and Smith 2007) and more rural contexts (*e.g.* Winterton and Warburton 2012). This research shows that the emotional bond associated with place can also be threatened by change. This is clearly demonstrated in the article by Buffel *et al.*, where it is argued that declining inner-city neighbourhoods have had a negative impact on older people's capacity to engage and control their environments and, hence, on their capacity to be socially included and age well. In their article, they compare qualitative data from studies conducted in these two countries exploring older people's experiences of ageing in deprived inner-city neighbourhoods. Despite different contexts and policy environments, findings suggest that local neighbourhoods are highly significant to the experience of social exclusion/inclusion as populations across the world increasingly age in place.

Scharlach and Lehning's article focuses on ageing-friendly communities in the USA. As Lui *et al.* (2009) suggest, the age-friendly community is a growing trend in ageing policy and discourse across countries and is seen as a positive approach to the challenge of population ageing. Endorsed by key international organisations like the WHO and the United Nations, this approach emphasises the relationship between individual health and the built, natural and social environment. In 2005, the WHO launched its Global Age Friendly Cities Project in 33 countries across the world. In their article, Scharlach and Lehning discuss how this move has generated interest in the development of age-friendly communities and present some interesting examples of ageing-friendly initiatives across the USA.

In all, this special issue explores some interesting and diverse examples of policy practice in social inclusion across different regions of the world. In particular, here we have focused on social inclusion in some of the less widely reported regions, and particularly Asian countries, such as China and Hong Kong, in order to extend knowledge of the implications of ageing and social inclusion within these diverse contexts. Further, articles in this special issue highlight the multifaceted nature of the concept, and the importance of facilitating the social participation of individuals and social groups across the different domains identified in the literature (*e.g.* Burchardt, Le Grand and Piachaud 2002). Specifically, here we have explored issues associated with maintaining social inclusion for older workers in employment (Taylor *et al.*) and other forms of economic production (Cheung and Leung), recognising the need for lifelong approaches to inclusion. Second, improving opportunities for positive

social interaction is a key objective of a social inclusionary approach, as noted in a number of papers. Specifically, these include the discussion presented by Scharlach and Lehning relating to policy and programmes associated with ageing-friendly communities across the USA; as well as the paper by Buffel *et al.* in relation to neighbourhoods across Belgium and the UK. Third, social interaction and cultural aspects of social inclusion, such as the importance of intergenerational ties, are discussed in the paper by Du. This paper makes the important point that the policy and practice of state welfare are changing in Chinese societies, which raises the question concerning the flow of welfare benefit information and advice that would be crucial in accessing entitled benefits to reduce social exclusion (Moffatt and Scambler 2008).

There are some important cross-cutting themes represented in this set of papers. First, relationships between generations are important in Asian countries, but are also an important component of programmes identified in the USA by Scharlach and Lehning. The need for family interaction and caring is also a common theme, balanced with support within and across the community (*see also* Barrett, Hale and Gauld 2012). Authors note the importance of older people being involved in decisions about issues that affect them, including within communities and the workplace, particularly as a social inclusionary approach values and listens to the views and needs of older people themselves. Other cross-cutting themes include the management of space to facilitate social inclusion, and the need to build common spaces that facilitate social and economic interaction. Social inclusion, particularly in the contemporary context, also recognises concerns about economic pressures in later life, and particularly the need to redress poverty and disadvantage across environments and contexts. Thus, overall, this special issue shows that there is a strong global need to move towards more inclusionary and cohesive approaches towards older people in an era of demographic ageing.

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