

Active ageing policies in Europe: between institutional path dependency and path departure ; synthesis report

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The ACTIVAGE Project

*Active Ageing Policies in
Europe: Between
Institutional Path
Dependency and Path
Departure*

**Deliverable D1:
WP 1 – Synthesis
Report**

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1 Introduction

After over a decade of bitter political controversy over welfare state reforms, active ageing policies promise battle-weary European social policy-makers much-needed respite. As demographic ageing threatens to unravel European social protection systems and labour markets in the not too-distant future, policy-makers across Europe have found themselves embroiled in divisive and bitter policy conflicts over welfare state reforms. Projected increases in old age dependency ratios with their implicit health care and pension system price tags have prompted a flurry of reform efforts across Europe. As a rule, European policy-makers have focused on bringing social protection systems into line with projected increases in demand for pensions and health care. Invariably, this has meant retrenching pension and health care systems. Perhaps unsurprisingly, reform experiences of the past years have not been particularly happy.

Active ageing policies promise to put an end to all of that. Rather than merely treating the symptoms in form of higher social expenditure, advocates of active ageing policies suggest targeting the root causes of poor health, inactivity and dependence in old age. Rather than forcing decision-makers to choose between painful and equally unattractive reforms, active ageing promises 'win-win-win' solutions that benefit all stakeholders (Walker, 2003). In this way the concept of active ageing promises to transcend policy conflicts.

However, although the concept of active ageing has joined the illustrious group of 'good ideas' that rattle around in European polities, it has yet to attain a prominent position on European policy agendas. In most European countries (with the exception of Finland, see Piekkola, 2003), active ageing is a political backwater. Commitment from policy-makers in the main is of more rhetorical than practical value and the governance resources devoted to developing active ageing policies are modest. Part of the problem is that demographic ageing is an inherently transversal issue. It affects a wide variety of policy domains and policy communities in different ways. As a result, the institutional landscapes in which actors formulate and implement active ageing measures are fragmented vertically (across levels of governance) and horizontally (across thematic policy domains). In short, despite being a 'good idea', active ageing as a social reform programme has yet to catch on (Arend and Gsponer, 2003).

The ActivAge project has set out to discover what it will take in terms of policy—making for the active ageing idea to hold its promise. In the first phase of the project, the consortium mapped the institutional terrain that would-be reformers

need to navigate. In other word, our research aimed to understand how different institutional contexts in Europe impinge of active ageing policy agendas.

Whether and how the idea of active ageing will go on to shape European social policy and welfare states will depend on two countervailing sets of institutional processes. The first set of institutional processes comprises what social policy researchers have called institutional path dependency (Esping-Andersen, 1990; Pierson, 1994, 1996, 2001; Palier and Bonoli, 2001). This institutional logic reproduces country-specific differences in social welfare provision. In this way, it ensures that the active ageing reform agenda remains well within the evolutionary trajectory of existing institutional welfare provision. This institutional dynamic strengthens the case for situating social policy-making sovereignty at national level. The second set of institutional processes nudges active ageing agendas off established evolutionary trajectories. By decentralising social policy-making, it replaces few but significant institutional differences at national level by a host of sectoral and problem-oriented differences at subpolitical level. Nonetheless, the thinking and the policy measures that emerge from these policy networks across Europe show a remarkable degree of coherence. Perhaps surprisingly, this strengthens the argument in favour of supranational policy coordination.

The next two sections show how the countervailing institutional processes lead to very different policy outcomes. In Section 2, the report outlines how the institutional structures of different welfare state regimes lead policy-makers to formulate characteristic policy responses to demographic ageing. Section 3 then goes on to illustrate how policy communities peripheral to the core welfare state institutions have developed common policy practices, a coherent critique of current social policy-making, as well as an active ageing policy programme. What is more, this section shows how welfare states themselves are changing in ways not predicted by institutional path dependency. The concluding section looks at the barriers and opportunities for active ageing policy agendas that emerge from the current European institutional and policy landscapes.

2 Institutional Path Dependency: Active Ageing Policy in the Heart of Welfare States

Across Europe, institutions of social welfare shape active ageing policy agendas in divergent ways. Path dependency, argue social scientists such as Gøsta Esping-Andersen (1990), Paul Pierson (2001) or Bruno Palier (2001), determines policy-making using three institutional channels. First, welfare states translate general social phenomena (e.g. demographic ageing) into specific policy issues (e.g. the financial sustainability of pension systems). Second,

welfare state regimes structure the policy networks and policy arenas that process the ageing issue. In this way, welfare state regimes empower some actors while excluding others from the policy process. Last, welfare state regimes give rise to characteristic types of policy outputs.

2.1 **Path Dependency and Policy Problems**

By defining certain conditions as undesirable social risks, by protecting certain groups against these social risks, and by choosing certain policy instruments, welfare state institutions articulate social policy problems. Demographic ageing in itself is not a social policy problem; it is even arguable to what extent the prospect of living longer, healthier lives is a problem at all. Within an institutional context, however, the consequences of low fertility rates and increasing life expectancy may very well exert strain on the viability and functioning of the system. At what points this strain will be felt depends on the design of the system. For this reason, welfare states from different regime types or families process demographic ageing according to their specific architecture.

Nordic Welfare States

In both Norway and Finland, policy-makers have defined demographic ageing as a problem of full employment. The Norwegian “de-luxe, top-of-the-range” welfare state has an in-built, systemic focus on labour market issues. Generous levels of universal benefits and services for wide range of social risks as well as a large public sector require a constant and substantial stream of tax revenues. Thus, avoiding poverty in old age while maintaining the high quality of Norwegian social provision means ensuring older people fully participate in the labour market. Despite the welfare state retrenchments in the wake of economic recession in the early 1990s, Finnish policy-makers also focus on maintaining high employment rates. Since ageing in Finland will set in earlier than in other European countries, Finnish policy-makers have looked for ways persuade older workers to remain in the work force. For this reason, occupational health and workplace well-being are central to Finnish active ageing policies.

Continental Welfare States

Continental European social insurance systems are caught in a triple squeeze. First, for contributions financed social insurance systems featuring generous income-related benefits, demographic ageing translates into a steep hike in contribution rates when the baby-boom generation starts retiring in 2010. Second, globalisation of goods and service markets are exerting a downward pressure on production costs just when unit labour costs in continental welfare state system are set to rise. The corresponding loss of competitiveness will lead to unemployment, which in turn exerts further pressure on social protections

systems. Third, labour market rigidities have meant that early retirement has been the policy tool of choice for easing socio-economic adjustment processes. However, this wide-spread practice magnifies the demographic pressures on social insurance systems. Consequently, the pressing social policy issue in continental welfare states is the financial viability of contribution-based PAYG social insurance systems.

Western European Welfare States

In Anglophone countries, the so-called “residual welfare-state” transforms demographic ageing into poverty and entitlement issues. Unlike continental European countries, demographic ageing is unlikely to exert excessive pressures on public finances. On the one hand, the ‘residual’ (or miserly) character of welfare state benefits in countries like the UK or Ireland merely protects individuals from falling into poverty: the main source of income in western European welfare systems is the labour market. On the other hand, reforms to pension and health care systems have contained and spread the costs of demographic ageing from the public to the private sector. Demographic ageing in western European welfare states, then, is not a threat to competitiveness or balanced public finances. Rather, the main policy issue in liberal welfare states is preventing poverty by providing access to employment. As a result, much of the ageing debate in the UK is framed in terms of barriers, rights and discrimination. Mayhew (2003) argues that age has become a proxy for assessing labour market capabilities. As a result, many older people are finding they are excluded from employment, health care or education services. Policy debate in the UK is about identifying and removing physical, mental and organisational barriers to labour market participation.

Central and Eastern European Welfare States

In the countries of central and Eastern Europe, socio-economic and political transition has produced a distinctive set of policy challenges. Unlike continental countries such as Germany or France, new Member States also face issues of governance capacity and capability. Although countries like Poland and the Czech Republic differ in many respects (size, political culture, social economic structure, etc), both countries feature bottlenecks in governance capability. While the socialist legacy means that central government is well developed in most new Member States, local and regional government capabilities are still emerging. After all, local and regional government are new and still need to define their roles and responsibilities. The same is true (possibly more so) for civil society organisations. While the last decade has seen an upsurge in NGO activity, much of this activity is still falling short of its full potential. Lack of funding, poor communication structures and inadequate access to decision-making hamper effective interest representation. At present, charities and NGOs that represent older people are too small, too scattered and too fragmented to make much of an impact (Perek-Bialas et al., 2003).

2.2 Path Dependency and Policy-Making

Welfare state institutions cast and choreograph social policy-making ballets in Europe. Institutional structures and practices only determine who takes part in policy debate, they also stage these political conflicts in specific policy venues. Significantly, the way welfare state institutions stage and direct policy conflicts lays down the rules of social policy mobilisation and interaction. Unlike the provision of social welfare, policy-making itself varies little across different welfare states. While policy networks and policy styles in the UK differ markedly from the rest of Europe, policy processes in Nordic countries resemble social policy-making on the rest of the European continent¹.

Who's In, Who's Out

Institutional path dependency determines who takes part in the social policy process. In E.E. Schattschneider's (1960) terms, welfare states designate who is organised into and who is organised out of politics. In northern, continental and Eastern Europe, social policy emerges from a stylised institutional dialogue between social classes. That is, institutional path dependency limits effective participation in social policy-making to organised representatives of employers (capital) and employees (labour). The underlying assumption is that organised interest representation adequately covers policy issues of all social groups, including women, the disabled or, notably, the old. Policy-making is a bi- or tripartite bargaining process between state organisations (usually central ministries) and so-called social partner organisations (centralised trade unions and employers' representatives). Authorised expertise and research support the negotiation process by furnishing the negotiating parties with data.

Policy interaction in these corporatist policy communities is a carefully controlled process. Since sustained principled policy conflict undermines the legitimacy of this decision-making process², class-based social dialogue

¹ This is in line with Karl Hinrich's (1999) contention that we have to distinguish welfare states in terms of their historical evolution rather than abstract institutional variables. On this view, existing welfare states unambiguously belong to one of two categories: the Bismarckian social insurance tradition or the Beveridgian universalist approach.

² Implicitly, processes of social dialogue rest on a technocratic rather than democratic legitimation. Rather than giving citizens or, based on a pluralist model, all relevant interest groups an effective voice in social policy-making, the exclusionary class-based social dialogue, via the so-called social policy consensus, claims two things. First, protagonists claim that reliable welfare provision, particularly old age income, requires a stable long-term political environment. For this reason, policy-makers should avoid excessive debate on welfare state provision; where debate is unavoidable, policy makers should limit participation to designated experts. Second, in many ways a corollary of the previous points, elite social policy-makers have justified the absence of effective political contestation in terms of their access to superior knowledge and technical skill for solving social problems (Nullmeier and Rüb, 1993). The so-called social policy consensus

inherently seeks consensus. Members of these closed and exclusive policy communities control conflict by non-decisions (Bachrach and Baratz, 1962; Smith, 1993; Nullmeier and Rüb, 1993; Ney, 2003a): in the past, reform agendas have rarely threatened the fundamental institutions of existing welfare provision. Whenever tri-partite policy actors suggest reforming basic structures, these have gone hand in glove with critical debates about the legitimacy of corporatist social policy-making.

Social policy-making by non-decision has given rise to two types of opposition. The former type, the authorised political opposition, contests issues within a given social policy consensus. Here, social partners argue and bargain about detailed technical adjustments rather than normative reforms. Ostensibly, these 'technical' adjustments aim to efficiently fine-tune welfare systems. The second type of opposition contests the social policy consensus and thereby the corporatist mode of social policy-making itself. Protagonists, usually but not necessarily policy actors outside the authorised social policy process (c.f. Ney, 2003; Hinrichs and Aleksandrowicz, 2003), aim to rebuild the welfare state according to a set of policy principles at odds with the existing institutional logic of provision.

Between Sir William Beveridge's universalist vision of social welfare and the centralist traditions of Whitehall, social policy-making in the UK stands out from the rest of Europe. Whereas social policy in other European countries occupies a unique and somewhat privileged position, welfare state regulation in the UK is no different, in systemic terms, from any other policy domain, say education or environment³. In general, welfare state policy emerges from a quasi-pluralist, consultative policy process. Policy subsystems dealing with social policy issues are relatively open in terms of organisational membership: state institutions (again mostly ministries and executive agencies) interact with a number of charities and NGOs (e.g. Help The Aged or Age Concern) as well as think-tanks and journalists. Unlike social policy communities in the rest of Europe, social policy-making in the UK is more receptive to activities in other policy domains. Fundamental policy conflict, particularly over the NHS and pension provision, is common. It takes place between loose coalitions of policy actors that coalesce around a particular set of policy beliefs⁴. However, looser interorganisational ties mean that the British government and public administration are neither as

articulates this claim. Sustained principled policy conflict about the fundamental institutional logic of welfare provision within these systems would necessarily undermine the claim that there is one best way of providing social welfare.

³ Please note that this is not to say that all policy domains in the UK are the same and follow similar rules. It does mean, however, that the differences in policy style between the education system and the pension system in the UK is not as dramatic as in, say, Germany or Austria.

⁴ The technical term is an "advocacy coalition" (c.f. Sabatier and Jenkins-Smith, 1993).

deeply implicated nor as dependent on the process of social dialogue as their colleagues in the rest of Europe. This and the Westminster parliamentary model mean that British government can choose to listen to the policy advice it sees fit⁵.

Setting the Stage

Welfare states provide the stage and setting on which social policy-making takes place. Across Europe, the types of 'locations' and venues for social policy-making are roughly the same. In general, policy-making occurs in a web of *ad hoc* organisations. These include expert commission (e.g. the *Pensionsreformskommission* in Austria or the *Hartz Kommission* in Germany), permanent and transient bi-or tri-partite boards (e.g. Norway's contact committee or the Czech Republic's Board for Business and Social Cooperation), consultative bodies (e.g. NICE in the UK), coalition committees (e.g. in Austria and Germany) and interministerial working groups (most notably in Finland but also in Germany)⁶. Additionally, political parties, trade unions, or employer's organisations provide an organisational context for informal contacts between different policy actors.

Venues for social policy-making are well insulated from three sources of critical scrutiny. First, since welfare state reform in the context of "permanent austerity" means applying losses on specific political constituencies (Pierson, 1996, 2001), much of social policy-making in Europe is about avoiding overt policy conflict and parliamentary confrontation (Pabst, 1999; Nullmeier and Rüb, 1993; Pierson, 2001). Consequently, the complex networks of venues are remote from parliament and inaccessible to citizens. Second, in addition to keeping social policy out of democratic control's way, social policy venues also shield social dialogue from the critical scrutiny of other policy communities. The only, albeit very significant, exception is that social policy across Europe is subject to continuing control by fiscal and financial policy communities. By providing ever tighter fiscal frameworks, treasuries in all European countries have effectively set the policy goals for contemporary social policy. Last, the organisational venues for welfare state policy are located at the national or central level of governance in all countries. Up until very recently, national policy-making

⁵ Paul Pierson (1993, 1994, 1996, 2001) argues convincingly the Westminster model does not make governing as easy as all that. He contends that the concentration of power in the Westminster model also implies a concentration of accountability: if things go wrong, voters will know whom to punish at the ballot box. The institutionalised social dialogue, in turn, diffuses and masks political blame behind consensus-politics and technical details.

⁶ This is by no means an exhaustive list. The social policy-making ad hococracy tends to wax and wane as issues move up and down the political agenda. In most cases, it is difficult for outside observers (and even participants in the processes) to determine what committee, commission or board is decisive at what particular point of the policy process.

platforms have been impervious to influence from both the supra-national (i.e. EU) and local levels. While institutional and individual policy actors at the local level in most European countries are responsible for the implementation rather than the formulation of social policy, institutions of the European Union are wary of being seen to encroach on subsidiarity.

Notable exceptions here are the countries of central and eastern Europe. Political and economic transition has made policy-makers more receptive to new ideas and new approaches. International organisations, most prominently the World Bank, the OECD, or USAID, have been instrumental in injecting ideas of welfare state “modernisation”, usually along the lines of the so-called Washington Consensus, into reform debates in central and eastern Europe. The strategic deployment of so-called “technical assistance” in reform processes explains why countries like Poland, Hungary and, to a lesser extent, the Czech Republic have decided against the European social model (Müller, 1999; Orenstein, 2000; Perek-Bialas et al. 2001; Perek-Bialas et al, 2003). In short, social policy communities of central and eastern Europe have been far more open to external stimuli than their counterparts in the old Member States.

The Rules of Engagement

Institutions not only structure the political game for those inside social policy processes. By determining the forms of political mobilisation and the rules of political engagement, welfare states influence the participation of older people in social policy-making. In most European countries, this constitutes a significant institutional barrier to the political participation of older people.

In social insurance welfare states, the social dialogue is the template for organised political participation of older people. In the corporatist policy processes, particularly Austria, France, Germany and Italy, the political aspirations of older people often fail to clear the institutional hurdles imposed by consociational processes. In the cases that senior citizen and pensioners organisations reproduce the appropriate structures, most notably Austria and, to a lesser extent, Germany (Leichsenring and Strümpel, 1999; Walker and Naegele, 1999; Aleksandrowicz and Hinrichs, 2003; Ney, 2003), the potential political impact has dissipated in consociational structures running parallel to the real policy processes. While these advisory councils both at regional and national level (c.f. Ney, 2003b) certainly help promote ageing and active ageing issues, they have fallen far short of expectations. In a very real sense, by mimicking the institutionalised social dialogue, policy-makers have been able to keep organisations representing older people at arm’s length from social policy-making.

Despite the more open and transparent nature of social policy-making in the UK, the system does not necessarily champion the political emancipation and empowerment of older people. Notions of philanthropy and charity, remnants of

Victorian England, colour the British engagement with the social in general and with older people in particular. Just like welfare benefits have never quite shaken the association with 19th century Poor Laws, charity, rather than political autonomy, dominates the representation of older peoples' interest in contemporary Britain. What all of these charities have in common, however, is that they are organisations *for* rather than *by* older people. Critical voices have argued that charities, which depend on donations, often resort to portraying older people as helpless and needy. In this way, charities reproduce widespread ageism based on misperceptions about the capabilities older people. Moreover, their proximity to government, some argue, disqualifies these organisations from representing the interests of older people.

In the countries of central and eastern Europe, the forms of political participation and mobilisation are in flux. In many ways, civil society actors in central and eastern European countries are in the process of forging a new institutional path rather than coping with the restrictions of inherited institutional legacies. While civil society activity was common under socialism⁷, rapid socio-economic change has undermined organisational capabilities for the representation of older people. Despite the differences in the general approach to active ageing between Poland and the Czech Republic (see following section), the representation of older people's interests depends in large part on the commitment particular individuals (Vidovicova et al., 2003; Perek-Bialas, et al., 2003). Outside the organised corporatist representation of pensioner's interests, particularly in the Czech Republic, the institutional landscape of NGOs is characterised by small-scale, poorly funded and scattered organisations. Along with the newly formed regional governments in the New Member States, civil society organisations are in the process of rediscovering and defining their new roles and functions. However, for many smaller NGOs and senior citizen organisations, economic restructuring and the attendant economic downturn in the 1990s has made the task of redefining the role of civil society considerably more difficult.

In general, then, the rules of political mobilisation and participation that govern the institutions of European social policy-making have done little to promote the autonomous involvement of older people in socio-political life. The notable

⁷ A common misperception in the West is that state socialism successfully suppressed civil society and political contestation. Yet, even the most repressive regimes in the former East Bloc, such as the former GDR, could not completely contain civil society activities. The regimes in Poland and Hungary, in turn, even sustained explicitly critical political organisations such as, most prominently, Solidarinosc. So, civil society in central and eastern European countries was not the wasteland many in the West (somewhat arrogantly) were expecting to find after 1990.

exception is the European countries with an institutional legacy of direct democracy and political participation such as Switzerland and Nordic countries. In the latter case, particularly in Denmark and to a lesser extent in Norway, the traditions of local participation and self-governance have meant that senior citizen advisory councils, similar in structure their counterparts in Germany and Austria, are equipped with real political power. Similarly, the tradition of referenda at cantonal and federal level in Switzerland has significantly empowered older people. Yet, whereas elements of direct democracy in the Nordic countries have been a progressive force in the policy process, the voting power of older Swiss at the referenda ballot box has proved to be a conservative influence on ageing policy-making.

2.3 Path Dependency and Policy Outputs

The concept of path dependency implies that institutional structures provide policy-makers with a limited set of policy options and policy instruments. By suggesting a specific issue definition, by organising certain actors into and other actors out of policy-making and by determining the shape of policy processes, welfare state regimes 'ensure' their own survival by reproducing themselves in the face of each new policy challenge. The institutional and organisational means available to policy-makers determines the types of specific policy responses to general demographic trends. For this reason, national policy responses to demographic ageing differ along the lines of the institutional trajectories of different welfare state.

Nordic Welfare States

The full employment imperative of Nordic welfare states has concentrated ageing policy on encouraging older workers to remain in the labour force. While this policy goal is by no means limited to Nordic welfare states, policy-makers in Finland and (to a lesser extent) Norway have pursued this objective in a characteristically 'Nordic' manner. Here, policy-makers encourage older workers to remain in their jobs by firm-level measures aimed at creating adequate individual and environmental capacities. These include adapting both the workplace to suit the special needs of older workers as well as changing the skills profile of older workers themselves.

The Finnish active ageing policy is a particularly comprehensive and coherent example of this approach. In three national programmes aimed at retraining older workers (National Programme on Ageing Workers 1998-2002), adapting work-places (National Well-being at Work Programme), as well as encouraging on-the-job training and life-long learning (Workplace Development Programme), Finnish policy-makers tackle the immanent drain of skill and experience from the labour market. Commentators point to three success factors. First, Finnish

responses to demographic ageing emerge from an egalitarian tri-partite policy process. Not only are social partners involved in all phases of decision-making, this process also features intensive cooperation between different ministries (e.g. the ministry of labour and the ministry of health). Second, the programmes enjoy strong research support and monitoring. At each stage of the project life-cycle, public health and labour market researchers survey and evaluate the impact of the programmes. Last, the policy measures that emerge from the tri-partite and knowledge-driven policy process specifically target the firm-level. That is, Finnish national programmes are directly relevant for the real working environments.

While economic decline coupled with an early onset of the demographic shift prompted Finnish policy-makers into decisive policy action early on, Norwegian policy-makers have no such incentive. On the contrary, oil revenues have sheltered Norwegian decision-makers from the harsh climate of 'permanent austerity' that describes social policy-making elsewhere in Europe. Nonetheless, Norway's society is ageing and Norwegian policy-makers are increasingly concerned about future developments. Although not pursued with quite the same vigour as in Finland, active ageing is also on the Norwegian policy agenda (Christensen, 2003). This is partly because 'activation' is an essential policy instrument in the Norwegian labour market toolbox (Christensen, 2003). Partly, however, policy-makers have realised that an ageing workforce has different needs than a younger workforce. In response, Norwegian policy-makers have initiated a set of policy measures aimed at producing "inclusive workplaces". Similar in character to the national ageing programmes in Finland, the underlying logic of this policy approach is to encourage older workers to remain in employment by changing work-environments as well as the capabilities and skills of older workers themselves.

Path dependent policy responses to ageing in Nordic countries are essentially *positive*. In order to encourage older workers to remain in the labour force, Nordic policy-makers have primarily relied on policy measures that build new and maximise existing capabilities. Core elements of this policy strategy include creating institutional capacity on the one hand (i.e. the creation of policy coordination organisations in both Norway and Finland) and individual capacity (i.e. training, further education and life-long learning) on the other. The underlying policy rationale is that re-equipping both older workers and their work-places with the necessary arsenal of skills and features nips demand for expensive welfare state benefits in the bud.

Continental Welfare States

In Bismarckian welfare states, policy causality seems to run exactly the other way. Rather than understanding full employment and active labour market policy as a way of relieving demographic pressure on social security systems, it is social protection that are exacerbating demographic strain on labour markets

and depressing employment rates. For this reason, the social insurance edifice itself is the primary target for ageing policy. The aim of retrenchments to social insurance systems is to deter workers from early retirement.

Reforms to social insurance systems, most prominently pension systems, have dominated policy agendas in continental Europe. Policy-makers have deployed a wide-ranging arsenal of formal-legal instruments to raise the statutory and actual retirement ages. Apart from reducing many so-called non-contributory benefits, policy-makers have manipulated pension benefit formulas in a multitude of ways. These include increasing qualification periods (e.g. France and Austria), reconfiguring annual pension adjustment arrangements (e.g. France, Germany and Austria), and building factors into the formula that adjust pension benefits to changes in life expectancy (Germany). In some countries, notably Italy and Germany, pension reforms have shifted the systems from defined benefit to defined contribution schemes (explicitly in the Italian case, implicitly in Germany). What is more, policy-makers have tried to prevent workers from retiring early by closing down popular avenues out of the labour market, most notably disability pensions. In all continental countries (except Austria), pension reforms also created the legal framework for the provision of old-age income outside public pension systems. These reforms in Bismarckian welfare states consist entirely of top-down command-and-control measures, usually in the form of statutes. Bismarckian welfare states, policy responses to demographic ageing are about remote manipulation of social insurance institutions.

Rather than reforming labour markets to curb the demand for social protection systems as in Nordic countries, policy-makers on the continent have targeted social insurance systems. Recent reforms in conservative welfare states have closed down alternatives to labour market participation for older workers. However, they have done this without corresponding reforms in labour markets. In this sense, ageing policy in continental Europe is a *negative* exercise in retrenchment and redesign. Here, the underlying logic has been to 'roll back' public provision hoping that the private sector can cover the shortfall.

Western European Welfare States

Unlike the rest of Europe, policy responses to ageing in liberal welfare states are inherently more fragmented and dispersed across different policy communities. For this reason, the objectives of policy responses to ageing are probably less coherent (or more incoherent) than in Nordic or continental social policy systems. Nonetheless, British ageing policy aims to retain workers in employment for as long as possible by identifying and removing barriers to the labour market.

In order to enable fair access to employment for older workers, policy-makers use a wide-range of direct and indirect policy instruments. Direct policy

instruments target obstacles to the labour market, to health care, or to education services. Here, policy instruments range from self-regulation (always popular in post-Thatcherite Britain) in the form of voluntary codes of practice on age diversity to watch-dog institutions such as the Disability Rights Commission. In between, we find a whole host of 'atmospheric' policy measures designed to reshape misperceptions about older workers. The field of indirect policy measures is even more difficult to delimit: these include changes to tax regimes for individuals and firms, building and environmental regulations that will empower people with disabilities, or new approaches to providing health care.

In general, then, Beveridgian welfare states aim at providing the right socio-cultural conditions for building and developing capacities. Unlike the Nordic or continental welfare state set-ups, the policy focus in English-speaking countries is not concerned with the actual construction and development of capabilities. Instead, ageing policy in the UK is about defining legitimate social, political and economic entitlements for older people and then provides fair access to these rights. In short, policy responses to demographic change in liberal systems are about identifying and removing illegitimate barriers to societal and economic participation.

Central and Eastern European Welfare States

The collective journey from one socio-economic location to another shapes ageing policy outputs in central and eastern Europe in two fundamental ways. First, in both the Czech Republic and Poland, policy responses to demographic ageing reflect the way these countries deal with socio-economic and political 'modernisation'. While ageing policy is a vehicle for breaking with the past in one country, it has become a means of creating some form of continuity in the other. For example, pension reform in Poland⁸ in the late 1990s not only represents a radical break with the socialist legacy but also with European social protection models in general. Although policy-makers in the Czech Republic have been reluctant to abandon what, after all, were reasonably functional social protection mechanisms, the Czech polity is among the few polities in Europe to have formulated a coherent, knowledge-driven, and comprehensive national policy programme for active ageing (Vidovicova et al., 2003). Between 1999 and 2002, Czech policy-makers and experts launched an ambitious and well-crafted policy initiative (The National Programme for the Preparation For Ageing 2003-2007) aimed at activating older people. Vidovicova et al. (2003) point out that the new ageing policy agenda bears a striking resemblance to the ageing plan devised in Czechoslovakia in 1985. However, both the process and policy outcome are exemplary and unique in

⁸ As well as in Hungary and the Baltic States (Müller, 1999; Orenstein 2002).

Europe. Thus, on active ageing, Czech policy-makers and experts are also rapidly leaving behind most other European polities by rebottling old wine.

Second, transition also shapes active ageing policy outputs in a more pernicious way. As we have seen, the fundamental policy issue in central and eastern European countries is the lack of governance capacity in public, private and tertiary sectors. Despite being far too early to evaluate, critical commentators of the more radical pension reforms in central and eastern Europe question whether the private insurance sector will be able to perform as promised. Moreover, in Poland the first stages of implementing the 1998 pension reform ran into difficulties because of administrative shortfalls in the public social insurance institution (ZUS) (Perek-Bialas et al., 2001): in part, the ZUS lacked the computing and staff capacities to implement the NDC pension accounts. In general, Perek-Bialas et al. (2003) argue that active ageing policy disappears from its already tenuous position in the Polish policy agenda as soon as the economy slows down. Similarly, the economic costs of transition, low growth rates and relatively high unemployment have suspended the implementation of the comprehensive Czech active ageing programme.

2.4 Implications for European Active Ageing Policy Agendas

The different institutional legacies of European social protection shape the goals and means of active ageing policy in Europe. Although European policy-makers currently face similar general problems associated with demographic ageing, the way these issues get articulated into specific policy problems as well as the types of policy instruments at disposal of policy actors differ from one welfare state regime to another. As we have seen, Nordic welfare states will translate demographic pressures into labour market issues for which policy-makers find positive, immediate policy solutions at the level of the firm. In welfare states of the continental-conservative family, policy-makers focus on the financial sustainability and economic viability of social insurance edifices; here, solutions will take the form of remote top-down policy measures. Welfare states in western Europe, in turn, define demographic ageing in terms of poverty and entitlements. Policy approaches aim to break down barriers and enable access to the labour market, politics and society. Here, policy actors prefer policy instruments that work with the market. In central and eastern European countries, the process of transition determines active ageing policies both in the basic approach to socio-economic modernisation as well as the constraints on governance capability. At this level of analysis, European countries will continue to tread on the paths forged for them long ago.

What does this mean for the European active ageing policy agenda? Institutional path dependency implies that social policy agendas in Europe will

continue to diverge in significant ways as policy-makers respond specific issues that emerge from welfare state regimes. Any active ageing policy agenda at European level will have to take into account and work with the institutional variety characteristic of European welfare states. For European policy-makers, institutional path dependency means that the adequate institutional context for formulating and implementing responses to demographic ageing will continue to be the national level. While policy actors at European level can formulate broad goals (e.g. 50% employment rate 54-64 age group by 2010), effective and strategic policy concepts emerge from the level of national welfare states. Moreover, institutional path dependency and lock-in also mean experiences in other European countries are of academic interest but have no policy-making relevance outside their specific institutional context.

However, there is reason to believe (and indeed evidence from the ActivAge project to suggest) that path dependency is not the primary, let alone only, institutional process shaping active ageing agendas. Two sets of circumstances should give cause to reconsider some of the stronger claims of the New Institutionalists (Bonoli, 2000; Bonoli and Palier, 2001).

First, the ActivAge research revealed considerable differences between countries within welfare state families. For example, policy responses to demographic ageing in Norway resemble the comprehensive Finnish programmes only in their general concern for labour market participation. While Finnish policy-makers have constructed an inter-disciplinary and multi-level policy framework, Norwegian policy actors have been content to strengthen the *arbeidslinja* by systemic reforms to pension systems. Christensen (2003) argues that the 'inclusive workplace' initiatives have not been particularly successful. Similarly, recent pension reform experiences across continental Europe have resulted in disparate outcomes. At one end of the spectrum, Italian pension reforms of the 1990s have de- and reconstructed old-age income provision (Ebbinghaus and Hassel, 2000; Turcio et al. 2001). At the other end of the spectrum, pension reform in Austria has merely (yet significantly) retrenched pension benefits for workers while (in line with inbuilt distributional inequities) more or less leaving civil servants old-age pensions untouched. The outcomes of pension reforms in Germany and France lie somewhere in-between: apart from tying benefits closer to contributions, reforms in both countries have set up legal frameworks for old-age income provision outside public social insurance systems.

Second, the ActivAge research has also shown that, regardless of particular institutional legacies, there are significant similarities between active ageing policy outputs. A comparison of the entire, admittedly fragmented, spectrum of active ageing policy measures in different countries does not reveal patterns suggestive of institutional path dependency. Undoubtedly welfare state structures, different policy communities and, not to forget, differing public spheres prioritise certain policy issues over others. However, this is not to say

that policy-makers operating in, say, a continental welfare state context slavishly reproduce social insurance structures. In fact, the ActivAge project demonstrates that the active ageing policy context gives rise to policies that deviate from institutional trajectories. Table 1 provides an overview of the types of policies that sit awkwardly in (a strict interpretation of) existing welfare state regimes. So while welfare state regimes determine policy instruments, policy-makers are far less constrained in their policy options and policy goals as the New Institutional literature suggests. Admittedly, many of these 'aberrant' policy initiatives and measures are marginal to the main thrust of social policy. Nonetheless, the fact that these strands exist at all indicates that something in addition to institutional path dependency is going on.

3 Institutional Path Departure: Active Ageing Policy at the Margins of Welfare States

Alongside the institutional dynamics that cause social policy agendas in Europe to drift apart at the macro-institutional level, a countervailing set of institutional processes is at work at the meso-level. At this level of analysis, differences between families of welfare states are far less significant than differences between structures, norms and practices of policy subsystems. In other words, the practical issues and problems involved in, say, the provision of local social services may be far more similar across national boundaries than the differences in welfare state regimes would suggest.

These centrifugal institutional dynamics consist of three elements. First, since active ageing is a transversal issue, it involves policy domains where institutional structures and practices are quite foreign to those of the welfare state heartland. Second, a critical pan-European policy discourse centred on the concept of senior citizenship has emerged from within these institutional landscapes. This discourse fundamentally challenges the way policy-makers define and deal with demographic ageing. Last, path dependency and institutional lock-in have not prevented European policy-makers from implementing structural reforms to prevalent social protection systems. Consequently, European welfare states are changing in terms of their organisational structures, their underlying ideologies and their institutional practices.

3.1 Alternative Institutional Landscapes

Ageing will affect most parts of European society in one way or another. Although traditional benefit transfer systems (i.e. pension systems, health

insurance, etc.) will play a pivotal role in any active ageing strategy, they will have to operate alongside (and preferably in harmony with) service-oriented social provision. Specifically, these are policy networks geared towards providing local health and social services on the one hand and, albeit to a far lesser extent, policy communities providing educational services to adults on the other. In many European countries, organisational networks for formulating senior citizen policy relate directly or indirectly to these service-oriented policy communities.

In most European countries, providing services (of any kind) is a different administrative, organisational and, not least, political game from transferring cash benefits. As a rule, providing and managing services is considerably more messy and complex. What is more, service provision implies proximity to recipients of these services. There is, then, a strong local and regional flavour to active ageing policy-making which sets it off from, say, pension reform.

What, then, are the organisational characteristics of these service-oriented policy networks?

Membership

Policy networks geared towards designing and administering social services are both more populous and pluralist than core welfare state institutions. Apart from consociational social policy players, these policy networks consist of a wide range of NGOs, experts, and regional governments. In general, organisations in these service-oriented policy networks pursue a wide variety of missions and interests. The NGOs in service-oriented social policy communities include large humanitarian organisations (such as the Red Cross), church-based aid organisations (such as the *Caritas* or *Diakonie* in German-speaking countries), generalist social policy NGOs (such as *SoVD* and *Reichsbund* in Germany, *Volkshilfe* or *Hilfsbund* in Austria), special issue organisations (such as societies representing people with particular diseases or impairments, e.g. Alzheimers or Osteoporosis), and senior citizen organisations.

Within service-oriented policy networks, senior citizen organisations come in many different guises. Some are affiliated to mainstream political parties or social partners. Most major political parties in continental Europe feature a unit designated to senior citizen policy-making (e.g. *SPD Senioren* in Germany, both the *ÖSB* and *PVÖ* in Austria). Similarly, many trade unions federations host pensioner's interest groups: examples include the *ÖGB Pensionisten* in Austria or the *Association of Pensioners and Trade Unionists* in the Czech Republic. Other senior citizen organisations are non-partisan NGOs organised by or for older persons. The pan-European NGO EURAG is an example for the former while British Age Concern or the German *KDA* are examples of the latter. Additionally, service-oriented policy networks also comprise a plethora of small organisations ranging from charities that provide local social services (such as

meals on wheels) as well as organisations that provide leisure and cultural activities. Private social service providers, while still of marginal importance in most countries⁹, are increasingly becoming a feature of social service provision.

Marginal and service-oriented social policy communities also house a different type of expert to core welfare state networks. In general, marginal social policy communities are the preserve of social gerontologists, social psychologists and age-related sociologists. Organisationally, much of this knowledge production takes place in specialist university departments (such as ageing centres at Oxford Brookes or at Sheffield University) but also in specialised research organisations (such as the *DZA* in Berlin or the *Senter for Seniorpolitikk* in Oslo). In the latter case, the research organisation actively takes part in policy formulation, implementation and evaluation (Christensen, 2003).

Since service provision always takes place in a local context, regional and local government are pivotal players in service-oriented policy communities. Often, regional and local government operate alongside central ministries within these networks. However, the portfolio of responsibilities for local and regional governments is usually far wider than for central government.

Structure and Integration

Organisational diversity and variation in service-oriented policy networks have meant that these communities are far less cohesive than core welfare state networks. As we have seen, patterns of transaction between the comparatively few organisations that make up core welfare state networks, most prominently pension provision, are explicitly delimited, tightly regulated and remain stable over time¹⁰. In the verdant organisational ecologies of service-oriented policy systems, the relationships between different types of organisations evolve continuously.

In place of the formalised and ritualised bargaining process of corporatist decision-making systems, organisations in service-oriented and marginal policy communities interact in a number of formal and informal ways. A common form of interaction and cooperation is the policy project. Often, central state organisations fund and participate in these types of projects that are the only means of survival for many smaller NGOs. The types of projects range from research and evaluation over policy-design and demonstration to awareness-raising initiatives. Larger organisations such as the Red Cross also initiate and

⁹ With the possible exception of the UK where private nursing homes for elderly are well-established.

¹⁰ This is true both for corporatist decision-making systems as it is for more open British social policy networks (c.f. Richardson and Jordan, 1983). Despite open policy networks at the margin, the central policy community (in Richardson's more anthropological sense) remains stable over time.

coordinate policy projects with like-minded NGOs. Regional and local government often contracts out service provision to commercial and non-profit service providers; here, the types of services mostly include transport, out-patient medical care, or the provision of hot meals. Over and above contractually-based and project-oriented cooperation, organisations also engage in multi-lateral informal interaction. For example, the five largest social service NGO's in Austria have formed a platform for formulating common positions on ageing, disability and long-term care policy.

While core welfare state policy networks distribute tasks and responsibilities hierarchically, the division of labour between organisations in marginal and service-oriented policy subsystem is poorly defined and fluid. In welfare state policy networks, central state actors (most commonly federal or national ministries) are responsible for policy formulation while social partners manage and oversee policy implementation¹¹. Although policy actors in core welfare state policy subsystems honour the distinction far more in the breach than in compliance, the roles and relationships between organisations and individuals in marginal social policy networks is fundamentally ambiguous. As a rule, local authorities and regional governments fulfil several different, often conflicting roles. For example, most local authorities are responsible for formulating, regulating and implementing social and health care services; this is the case in both Austria and Germany. In Norway, the tradition of local self-determination means that local government provides and administers key welfare state services and benefits. Similarly, the Swiss cantons are pivotal for the design, administration and provision of social services to the old.

Policy Styles and Policy Output

Since the structure and interorganisational ties in service-oriented policy networks are loose, negotiable, and inherently in flux, they impose relatively few constraints on policy actors. As a result, policy styles tend to be problem-oriented (e.g. the design, regulation and delivery of services) and knowledge-driven. Project work implies that policy actors focus their attention on specific issues. For example, at the same time Austrian corporatist policy actors in core welfare state policy communities were reforming *the* pension system, policy actors in marginal and service-oriented policy communities were (among other things) looking into health and safety of older people at home as well as evaluating the feasibility of instituting a senior citizen ombudsman (Ney, 2003b). By the same token, social policy actors in the UK are pointing out that the way the design of physical environments will impede or empower older people will a central policy issue in the future (Mayhew, 2003). Since policy debate in

¹¹ Although this hierarchical division of policy-making tasks tends to be more pronounced in countries with a corporatist institutional legacy, the next steps agencies (e.g. the Child Benefit Agency) in the UK are an attempt to keep policy formulation organisationally apart from policy implementation.

marginal and service-oriented policy subsystems takes place well out of the glare of the public sphere, policy actors can afford to disagree over policy issues.

A consequence of relatively loose ties and unconstrained interaction is that service-oriented policy networks produce innovative solutions. Policy actors in these subsystems do not have the battery of policy instruments of the welfare state machinery at their disposal. Consequently, solving policy problems requires, at the very least, some invention and lateral thinking. Examples of innovations in this area are new models of multi-generational housing in Austria, Germany and Switzerland, new forms of mobile and out-patient care across the continent, or concepts of promoting intergenerational solidarity such as the *nonno civile* in Italy or the *Seniorenbüros* in Germany¹². Even though the implementation of these policies and measures is inextricably intertwined with very local conditions, many of these ideas have travelled across national boundaries. The most prominent example here is the spread of senior citizen advisory councils throughout the 1990s. Although, as Alan Walker and Gerhard Naegele (1999) show, the structures and functions differ widely across Europe, the idea of providing older people with a political voice seems to have germinated in various institutional contexts.

The downside of policy-making free from the constraints of the social partnership and the pressures of high-level policy-making is that it takes place in relative obscurity. As a result, resources for funding innovative (or indeed any type of) policy activities are scarce. As a rule, policy initiatives are small-scale, experimental and highly vulnerable to budget-cuts (e.g. multi-generational housing in Austria and Germany). The general public, even the target populations, are poorly informed and the media are generally disinterested (Ney, 2003b).

In sum, service-oriented and marginal social policy communities are more populous and pluralist than their counterparts in core welfare state networks. Looser interorganisational ties mean that policy-making is problem-oriented and knowledge-driven. By widening the scope and type of policy actors in the debate, these policy subsystems expand the ageing issue from its narrow mainstream focus on the labour market and social protection systems. Thus, while the institutional contexts for policy subsystems in different countries diverge considerably, the way policy actors relate to each other as well as the fundamental problems in these networks are remarkably similar.

¹² The *Nonno Civile* (Civic Grandfather or Grandparent) is an initiative by the Naples municipal council in which retired members of the community provide support and guidance to young people in danger of drifting into criminality. The *Seniorenbüros* (senior citizen offices) in Germany and their counterparts in Austria (*Bürgerbüros für Jung und Alt*) are designed to promote and coordinate the voluntary engagement of young and older citizens.

3.2 Senior Citizenship as a Critical Policy Discourse

The second element of the countervailing institutional dynamic that shapes active ageing policy agendas in Europe is the emergence of a critical policy discourse centred on senior citizenship. In large part, this policy story has emerged from the service-oriented and problem-centred social policy communities at the margins of European welfare states. Nonetheless, this account of demographic ageing is not limited to any specific welfare state regime or country. Rather, policy actors across Europe are advocating policy-makers adopt a holistic approach to understanding and acting upon the challenges of demographic ageing. Like any good story, the Senior Citizenship policy discourse start from a set of assumptions, identifies the problem, and proposes a solution.

Assumptions

Demographic ageing, advocates argue, is possibly the most pervasive and important policy challenge we will have to face in the 21st century. As societies, we stand at the verge of momentous social change: demographic ageing is likely to transform all aspects of economic, political and social life. Such a comprehensive challenge calls for an equally thorough policy response. In order to suitably address the challenges and opportunities of demographic ageing, advocates argue that we all must start taking a holistic approach to ageing. Understanding demographic ageing solely as a fiscal problem, labour market issue or problem of comparative advantage means erroneously and illegitimately reducing the complexity of ageing a single component part.

For this reason, advocates such as Alan Walker (2003), Anton Amann (1999) or Gerhard Naegele (1999) urge researchers, policy-makers and citizens to adopt a life-cycle approach to understanding demographic ageing. Rather than concentrating on the fiscal, economic or employment aspects of ageing, the life-cycle approach relates the interaction of a wide variety of factors to individual and collective well-being over time (Amann, 1999). In particular, this suggests analysis and policy-making should look at the complex associations between factors such as (among others) family life, employment, education, socio-cultural participation, material security and health. Adopting a holistic view invariably entails that successful ageing policy-making addresses all generations: ageing policy is fundamentally about providing, extending and safeguarding political, economic and social rights for citizens of all ages. In short, citizenship for older people presupposes citizenship for everyone.

Box 1 outlines the Walker's seven principles of active ageing.

Walker's seven key principles of Active Ageing Policy

- *Nature of Activity*: "...activity' should consist of all meaningful pursuits which contribute to the well-being of the individual concerned, his or her family, local community or society at large and should not be concerned only with paid employment or production" (p.5)
- *Scope*: "active ageing must encompass all older people, even those who are, to some extent, frail and dependent" (p.5)
- *Active ageing is/ should be a preventative concept*. This implies adopting a 'life course' approach to understanding the ageing issue: active ageing policy, if it is to be effective, cannot solely concentrate on the current old but also needs to include policies for the future old
- *Centrality of intergenerational solidarity for active ageing policy*: "This means fairness between generations as well as the opportunity to develop activities that span the generations"
- *Active ageing encompasses rights and obligations*: "Thus the right to social protection, life-long learning and training and so on may be accompanied by obligations to take advantage of education and training opportunities and to remain active in other ways" (p.5)
- *Active ageing should be "participative and empowering"*: bottom-up initiatives must qualify and complement top-down measures (p.6)
- *Active ageing has to respect national and cultural diversity in Europe*: what counts as a 'meaningful activity' is likely to differ across Europe. (p.6)

Problems

The root cause of all problems associated with demographic ageing, advocates argue, is age-based discrimination. Alan Walker (2003) contends that in our fundamentally inequitable societies

"...in which a youth-good/old age-bad culture dominates employment, the media, popular culture and elsewhere (the family excepted), the contributions of older people are not valued to the same extent as those of younger people..." (p.19)

Inaccurate perceptions and discriminating beliefs about the capabilities of older people allow us to relegate them to the margins of society. "Age discrimination", Alan Walker argues, "is the antithesis of active ageing" (p.10).

Systemic ageism and inbuilt age discrimination, advocates of senior citizenship argue, give rise to policy problems in a wide range of societal arenas (Walker, 2003; Amann, 1999). First, labour markets practices socially exclude older workers. In general, labour markets create and reinforce inequities between rich and poor, men and women, old and young. This is why advocates of the senior citizenship discourse can identify a series of 'age barriers' in labour markets across Europe. Located in firm-level employment practices, 'age barriers' prevent older workers from remaining in or rejoining the labour market. Walker (2003) argues that

“...employers forced to reduce employment concentrate redundancies on older workers (often in agreement with trade unions) and, in turn, long-term unemployment affects older workers more than younger ones” (Walker, 2003, p.9)

As a result, older workers are, as a matter of course, ejected and barred from employment opportunities.

Second, systems of old-age income provision reproduce and perpetuate labour markets inequities. Bismarckian social insurance models in particular extend social differences into retirement. Moreover, argue advocates, all European pension systems encourage early retirement and suppress any type of activity, economic or otherwise, after leaving the labour market. Dependency and inactivity, then, are designed into European pension systems.

Third, health care systems across Europe are poorly configured to deal with demographic ageing. The traditional emphasis on remedial rather than preventative health care will not only increase health care costs but also will impose high toll on society in terms of foregone labour power (OECD, 1998). Health and activity, Walker argues, are dialectically related: good health is the precondition for an active life which, in turn, promotes good health. By the same token, research suggests that ill-health and employment also are intricately related. A policy that encourages (or forces) people to remain in the labour market must also address inequities in working conditions. Forcing workers to remain in dangerous, high-stress or unsuitable working environments for longer than necessary will merely increase work-related disease. In other words, effective active ageing policy needs to 'uncouple' the relationship between ill-health and work (Walker, 2003).

Fourth, all these policy measures imply the political emancipation of older people in Europe. The politics of old age, proponents argue, is subject to a paradox: just as demographic ageing increases the electoral clout of older people, their political significance seems to be in decline (Walker and Naegele, 1999; Leichsenring and Strümpel, 1999). However, throughout the 1990s, bodies designed to give older people a political voice, such as senior citizen advisory councils, emerged in most European countries (Walker and Naegele,

1999). The form, institutional location and political influence of these bodies differs widely. While some bodies, notably regional advisory bodies in Denmark, provide older people with real political influence, others, most notably in Austria, absorb and dissipate the political aspirations of older people.

What is more, argue the advocates of senior citizenship, the policy debate about ageing in all European countries is misguided. European policy-makers, stuck in institutional straightjackets of welfare state legacies, have concentrated on the symptoms rather than the root causes. While preoccupied with dependency ratios, rising social insurance contribution rates or increasing health care costs, Walker (2003) argues, policy-makers in Europe have nearly lost sight of the 'real issue': the "...economic activity rate and, specifically, unemployment among older people" (p.11). Rectifying this problem, though, will require unravelling the complex links between social inequities, ageism and social exclusion.

Solutions

An all encompassing issue such as demographic ageing, contend advocates of the senior citizenship discourse, requires a comprehensive and integrated policy response. An active ageing policy strategy worthy of the name, then, should aim at no less than a complete overhaul of discriminatory socio-institutional norms and practices. This reform programme implies that we will have to fundamentally change the way we think and behave.

A first but crucial step towards this goal, however, is for policy-makers to expand the scope of ageing policy-making. Active ageing policy, advocates suggest, needs to strategically exploit synergies across different policy domains. This implies that national policy-makers can no longer hide social policy-making behind the (increasingly thin) veil of subsidiarity: the socio-cultural challenge of demographic ageing is the same for all Europeans.

What broad policy goals should a European active ageing agenda pursue? Alan Walker (2003) outlines four area of importance. First, in order to overcome ageism in the labour market and attain the Lisbon targets, Europeans need active employment strategies (Amann, 1999). Policy-makers, he argues, should take into account that older people in the future will rely on four sources of income: income from public pension systems, from occupational pensions, from private savings and from earned income (c.f. Giarini and Liedtke, 1998). However, this implies that any policy limited to removing financial incentives to early retirement alone is likely to fail. Without simultaneously combating age discrimination, retrenching pension systems alone conscribes older people in marginal employment to poverty and destitution. Effective anti-discrimination policy, in turn, requires hands-on age management at the organisational level.

Second, advocates of the senior citizenship acknowledge that pension systems are in need of reform. However, unlike the general thrust of pension reform in Europe (with the notable exception of Norway), pension reform should aim at providing older people with the material means to fully participate in social life (Amann, 1999; Ney, 2003). For many marginal groups in the labour market, such as women or people with disabilities, this means that pension systems provide some form of basic or guaranteed minimal income regardless of prior contribution. What is more, pension systems should not erect barriers to labour market participation of older people. This implies abandoning mandatory retirement ages, reducing the punitive nature of taxation on earned income during retirement, as well promoting pension arrangements that permit part-time employment (Walker, 2003).

Third, since good health is the pivotal precondition for activity in old age, any active ageing policy must weave health care and social services into the overall policy fabric. Rather than expending scarce policy-making resources on structural and financial reforms to health care systems, advocates of the senior citizenship discourse suggest reforming the underlying approach to providing health care. Avoiding skyrocketing health care costs in the future involves breaking the link between poor health and employment (Walker, 2003): European health care systems need to prevent ill-health rather than curing disease at great costs. Moreover, activity and societal participation for the very old and frail, a group set to increase considerably in the coming decades, call for effective long-term care. Here, the active ageing policy imperative is to develop innovative concepts of long-term care and social service provision.

Last, but by no means least, any active ageing agenda must be about democracy, rights and citizenship. In a very real sense, combating discrimination in the labour market, providing adequate old-age income and ensuring good health in old age empowers older people. However, while societal reforms represent one side of what David Held (1995) calls “double democratisation”, real change in political systems is the indispensable other side. Active ageing policy, argue the advocates, has to provide older people (and, by extension, everyone) with a real say in decision-making. In this way, European citizens can take active control and responsibility for their ageing. This also includes promoting the civic engagement of older Europeans.

Senior Citizenship and the New Politics of Ageing

In sum, the active ageing policy agenda outlined by advocates of the senior citizenship discourse is nothing short of a socio-‘cultural revolution’. Not only structures but also fundamental societal values will have to change if we are to deal effectively with the formidable challenges of demographic ageing.

As idealistic as the discourse and the policy vision it transports may appear, they nonetheless pose a seriously political challenge to established welfare

state policy communities for three interrelated reasons. First, the senior citizenship discourse makes a coherent, knowledge-based and, ultimately, attractive case for policy renewal. More importantly, however, the policy story makes a very strong *public interest argument*. In contrast, the adherence to consociational policy-processes is becoming increasingly difficult to justify in public interest terms; membership of established welfare state policy communities has acquired a (not quite unjustified) air of privilege. Second, the senior citizenship discourse feeds on the increasing impatience on part of the European citizens with tired and ineffective corporatist decision-making systems. The senior citizen discourse is the conceptual core of a transnational advocacy coalition consisting of policy actors (i.e. charities, service providers, NGOs, research organisations, and university professors) with considerably more political credibility than present social policy-makers. Third, the vision of active ageing as senior citizenship is an eminently sensible idea. Who in their right mind, after all, could possibly oppose more wealth, better health, and more political influence? And, as advocates assure us, all within easy reach. Although history would suggest that these sweeping socio-cultural changes are rare (not to mention usually triggered by undesirable events such as war, famine, epidemics, etc.), the senior citizenship discourse points out that we are in a historically unique situation. At present, a window of opportunity, a rare window at that, is open for sustainable and successful policy action: usually divergent interests of actors all converge on the active ageing strategy. In short, the concept of active ageing provides benefits to all stakeholders while imposing no costs.

3.3 Path Departure in Welfare State Regimes

The last aspect of the countervailing institutional dynamic in Europe is the change in welfare state regimes themselves. Contemporary social scientists have eloquently argued that institutional lock-in has in large part determined the outcomes of reform efforts of the past two decades. Since cutting welfare state benefits is not likely to be overly popular and pluralist democracies offer ample opportunity to punish unpopular politicians, so the argument goes, policy-makers have not had the stomach for incisive reforms. Instead, reforms have been incremental, piecemeal and iterative. More importantly, on the whole reforms have moved well within the institutional logic of existing provision.

However, even New Institutionalist thinkers concede (c.f. Pierson, 2001) that reforms have actually changed welfare states in important ways. Other social scientists (Nullmeier and Rüb, 1993) argue that, over the course of two decades, many incremental policy adjustments have amounted to a wholesale shift in the orientation of social policy. While New Institutionalists are right in pointing out that actual benefits and provisions have changed within the 'normal'

parameters of each individual welfare state regime, the subpolitics of welfare state policy-making has transformed considerably.

Public pension systems are at the heart of the welfare state regimes (Esping-Andersen, 1990). The way pension systems change, then, reflects the general direction of welfare state reform. Pension reform experiences of the past decade have affected the way policy-makers go about setting pension reform agendas and formulating pension policy. The changes, which took place at three interdependent levels, have widened the scope of political conflict in all countries.

Pension policy communities in Europe have become more open and pluralist. Traditionally, a relatively limited set of designated pension experts populated pension policy communities. Moreover, these policy networks, based on the exchange of accredited pension data and political compliance, tended to closely reflect corporatist socio-economic cleavages. Throughout the 1990s, however, new actors have challenged established policy communities across Europe. Both the media as well as financial interests (such as the banking and insurance industries) have made successful inroads into established pension policy communities. What is more, new policy actors have mounted a successful scientific challenge to established pension knowledge: pension knowledge orthodoxy has turned into pension knowledge heterodoxy. As a result, the interaction between policy actors has deviated from the consociational blueprint outlined in Section 2 to become increasingly problematic and conflictual.

Policy conflict about pension reform falls into three distinct categories.

- First, European countries feature a group of policy actors (whose institutional 'location' differs from country to country) that stress intergenerational equity: pension reform has to ensure that financial burdens of demographic ageing do not cripple the younger generation of workers and, by extension, the economy. These policy actors suggest that the retired should increasingly rely on private sector mechanisms.
- Second, all countries feature policy actors that argue in favour of preserving social stability: here, pension reform needs to strengthen, not weaken, existing institutional pension arrangements that guarantee of social stability and social peace. These policy actors form what New Institutionalists refer to as the "pro-welfare coalition" (Bonoli, 2000).
- Last, certain policy actors in many (if not all) European countries argue for a more equal and just pension system: according to these policy actors, pension systems should level the differences between citizens (rich and poor, men and women, foreigners and natives, etc.). In a very real sense, the Senior Citizenship discourse embraces this policy story about pensions.

These three “pension policy stories” have provided the ideological basis for policy conflict in Europe. The level of conflict, however, varies across different countries. In Austria, Germany, France and Italy, policy conflict is most heated: here, pension debates have become “intractable policy controversies” in which all parties to the debate are firmly entrenched in their respective position. Here, pension reform has proven particularly difficult and politically risky. In countries such as Norway and Poland, in turn, policy conflict is at a more intermediate level: here, controversial reforms have taken place at relatively little political cost.

Further, the last decade has witnessed an ideological realignment of political elites in most European countries. Increasingly, political parties no longer neatly reflect corporatist cleavages. Rather, political parties themselves have become locations of principled policy conflict about social policy. Throughout the 1990s, major parties have shifted towards the centre of the political spectrum. This has left many policy actors, most notably the unions, without strong institutional backing at the political level.

The changes in pension policy communities and the emergence of policy conflict have generally empowered governments relative to policy actors. The reforms have brought about two somewhat contradictory effects. On the one hand, the diversification of actors and ideologies has increased strategic options for governments: whereas policy-making was inexorably tied to corporatist decision-making structures before the 1990s, the past decade has opened new channels of policy communication and new potential alliances (such as alliances between social democratic parties and financial interests). On the other hand, the introduction of conflict and scientific uncertainty has made policy-making a far more precarious undertaking: whereas corporatist structures ensured compliance and co-operation from policy actors, new policy-making realities render policy outcomes far less predictable. Consequently, policy failure has become more likely and the price of failure has in many cases meant the demise of governments.

In general, the changes in pension policy-making have given rise to a paradox. Although pension policy communities have become more open and pluralist, this has not necessarily implied an increase in democratic accountability. In most countries (except Norway), the policy process circumvents parliament and changes have, generally, released the executive from corporatist controls. Furthermore, increased policy conflict has left pension reform policy processes less linear, more complex, and increasingly messy.

3.4 Implications for Active Ageing Policy-Making

These institutional processes provide a more optimistic outlook for European active ageing policy-making. Path departure at the level of national welfare states means the scene of active ageing policy-making is increasingly shifting away from systems of serial political processing to the more murky waters of parallel subpolitical policy-making (Baumgartner and Jones, 1993). As policy networks with a fundamentally different approaches to policy-making become implicated in ageing policy formulation and implementation, we may witness a reorientation of problem definition and agenda-setting. Rather than emphasising institutional incommensurability in order uphold the privileged access to policy-making, policy actors may actively seek transnational cooperation to solve practical problems of service-provision. Within this institutional stream, active ageing policy becomes a common search for solutions to problems of ageing that persist across boundaries, whether they are policy domains or national welfare states.

Within this institutional trajectory, there clearly is a role for the EU in the formulation, coordination and implementation of active ageing policy. This role stretches beyond setting broad policy goals to potentially include a wide range of regulatory issues (e.g. setting standards for care and social services, regulating the political participation of older people, minimal environmental and work-place standards, etc.) and coordinating functions (e.g. networking and connecting different policy networks across Europe via policy programmes). However, it seems most practical and feasible to start the networking processes with policy subsystems that differ the least. Since path departure takes place at the meso-level of policy-making (Rhodes, 1990), the coordination efforts are best concentrated on the subpolitics of ageing policy-making in Europe. This means that policy coordination at national level is less likely to be successful.

The EU should build on existing and potential synergies the between similar policy subsystems across national borders (i.e. long-term care, NGO sectors, etc.). In the context of institutional path departure, policy tools such as the open method of coordination (OMC) may have an ambivalent effect on active ageing agendas. On the one hand, the OMC sharpens national social policy-makers' awareness of common policy issues. In this sense, the OMC may itself contribute to path-departure. On the other hand, by inviting national social policy-makers to draft National Action Plans, the OMC reorients the policy focus to the national level. This, in turn, may strengthen path dependent institutional developments. If European policy actors want to exploit the centripetal forces of institutional path departure¹³, then the EU institutions will have to rely on policy instruments that connect, strengthen and promote the activities in the alternative institutional landscapes. This implies creating a legal framework at

¹³ There is some indication that this is the case. Alan Walker (2003) has drafted an active ageing policy programme for the European Commission along the lines of the Senior Citizenship discourse.

European level (e.g. the anti-discrimination directives) as well as a flexible institutional structures that provide shortcuts between the local policy contexts and European policy-making.

4 Conclusions: Barriers and Opportunities for Active Ageing Policies In Europe

The first phase of the ActivAge project investigated the institutional contexts in which active ageing in Europe takes place. Our research discovered that active ageing has become a policy issue across Europe, albeit not a very important one. In all countries except Finland, active ageing is a political backwater. This is not to say that policy-makers and politicians completely unaware about active ageing. In all European countries, policy actors are claiming to be committed to implementing an active ageing policy agenda. However, the commitment to active ageing, it would seem, is of the same quality as European policy-makers' commitment to sustainable development or S&T policy: arguable. Nonetheless, polities in many European countries (e.g. Germany, Austria, Czech Republic) have devoted some administrative capacity to ageing policy-making.

The issue that runs like a thread through the findings of the ActivAge project is institutional fragmentation. In all countries of the ActivAge sample, responsibilities for active ageing policy-making are scattered across policy domains as divergent as adult education, local social service provision and labour market administration. With the exception of Finland, whose structured national programmes on ageing are exemplary (even for Nordic countries), none of the countries coordinate these divergent strands of policy-making. As a result, the active ageing policy agendas, in the countries that own such programmes, tend to be a rather eclectic mix of policy measures and initiatives.

As we have seen, institutional fragmentation is the reason why two sets of countervailing institutional processes impinge upon active ageing agendas. One set of processes emphasises institutional continuity. Here, the institutions of the welfare state appropriate the idea of active ageing and mould it within their own institutional cosmos. This means that European active ageing policy invariably branches and bifurcates within the different national welfare state policy communities. This development would imply that active ageing policies are best located at the national level of welfare state regimes.

However, another set of institutional forces drives active ageing policy agendas in Europe in another direction. These institutional dynamics emerge from three sources. First, the fact that demographic ageing will affect a number of different policy domains means that the institutional landscapes are considerably more variegated than welfare state regimes may suggest. In particular, service-

oriented and marginal social policy networks operate according to a different set of organisational rules. This quite simply provides conceptual and organisational alternatives to conventional welfare state policy-making. What is more, policy-makers in these networks seem less daunted by national boundaries. Second, a coherent and well-argued policy discourse centred on the idea of 'senior citizenship' has become a fresh conceptual resource for agenda-setting and policy formulation. Not only does the concept provide a plausible story about demographic ageing, it also makes a strong public interest case for a comprehensive programmes of socio-cultural renewal. Last, but certainly not least, welfare state regimes themselves are changing. While social protection systems themselves have not changed radically, the way policy-makers go about setting reform agendas and formulating policy has. In most countries in the ActivAge sample (with the exception of Norway, the post-war social policy consensus is in a poor state or has collapsed. New policy actors have brought new ideas and practices to welfare state policy-making.

Torn between two institutional trajectories, how will active ageing policy agendas in Europe develop? What barriers and opportunities emerge from fragmented institutional landscapes subject to contrasting institutional developments?

Despite different institutional legacies, the ActivAge research uncovered a set of institutional barriers common to all countries in the sample:

Structural Barriers

The vertical and horizontal fragmentation of institutional capacity in the public, private and tertiary sectors significantly hampers the development and implementation of active ageing agendas. Fragmented responsibilities have led to disjointed and poorly coordinated policy programmes. Moreover, when disparities across levels of governance (most prominently in France and Germany) join thematic tensions across policy domains, the interaction between different policy-makers becomes, at best, tenuous.

In addition to institutional fragmentation, the political mobilisation of older people is poorly developed in Europe. Existing senior citizen organisations have not managed to provide older Europeans with an effective political voice. Experimental political parties designed to represent the interests of older people (e.g. in Poland, the Czech Republic, or Germany) have rarely survived a election.

Last, in times of 'permanent austerity', policy-makers seem to view active ageing measures as somewhat of a luxury. Policy agendas and funding are likely to wax and wane with economic growth. For active ageing policy-makers in old Member States, this means that some years are lean and other years are leaner. In countries such as Poland or the Czech Republic or even southern

Italy, it implies that active ageing policy disappears with every economic downturn.

Socio-Cultural Barriers

Ageism and age discrimination, the ActivAge findings suggest, are a major barrier to the development of active ageing policies. The main problem here is the way misperceptions concerning the capabilities of older people pervade society. All social arenas, be it the state, the markets, technology, the arts or the mass media, seem to be obsessed by youth and repelled old age. Ageism and age discrimination are so wide-spread that even older people themselves lack confidence in their abilities. These exclusionary norms and practices, policy actors argue, are exacerbated by a lack of awareness among key policy-makers to do anything about discrimination. The message activists in the field in all countries are communicating is that policy action on ageing policies falls far short of policy rhetoric. In all countries, lack of awareness coupled with wide-spread misperceptions about old age have resulted in an unwillingness by politicians to invest in active ageing policies. Policy-makers continue to define ageing issues in terms of narrow fiscal and economic aspects. Unless these (mis)perceptions change, active ageing is not likely to rise on the policy agenda.

Conversely, the findings show a fewer commonalities in terms of opportunities for active ageing policies:

Structural Opportunities

In a very real sense, institutional structures in Europe are both barriers and opportunities for active ageing policies. In most countries of the ActivAge sample, existing institutional structures at all levels of governance hold considerable potential for successful active ageing policy-making. Across Europe, there is a 'critical mass' of institutional capacity (Vidovicova et al., 2003). Although the sectoral emphasis shifts from country to country (e.g. UK policy communities feature far more institutional capacity in the civil society than, say, Poland or the Czech Republic), governance capability *per se* is not a policy issue in Europe. Rather, policy actors across Europe agree, active ageing policies require the activation and coordination of institutional potential in Europe. Policy-makers, so the argument goes, need not reinvent the institutional wheel; rather, active ageing policies need judicious and strategic use of existing institutional resources. The entry of new policy actors such as NGOs or the European Commission into the social policy domain, argue policy actors in several countries, may go some way to seize the institutional opportunities in Europe. New policy actors at different levels of governance (for example, the local and supranational arena) are increasingly developing into a source of policy innovation compared to relatively rigid policy dynamics at the level of welfare state regimes.

Socio-Cultural Opportunities

Although awareness of ageing is relatively low among policy-makers, the media and the general public alike, the level of knowledge about old age and ageing is on the increase. Most significantly, older people themselves are becoming more conscious of their own abilities. What is more, the old of the future are increasingly aware of the issues and challenges surrounding ageing and retirement. Firms across Europe, led by the Finnish example, are slowly beginning to realise and tap into the rich reservoir of skills and experience older workers represent.

Although active ageing currently is not a burning hot policy priority, it nonetheless has become a staple in the policy diet of many European countries. This means the underlying concepts of active ageing policy-making are ‘floating’ around policy domains and are available for use. Moreover, these ideas and concepts are becoming an ‘unofficial’ yardstick or quality standard for policy responses to demographic ageing: in time, what Jon Elster (1998) calls the “normative force of hypocrisy” could begin to shape European social policy. Here, the fact that policy-makers publicly use the rhetoric of active ageing will create claims and commitments that, however cynical and self-serving the intention, will further active ageing policy agendas.

Last, civil society activities at all levels of policy-making are opening new avenues for policy-making and, more importantly, policy implementation. New forms of political participation and civic involvement of older people are emerging in all countries in the ActivAge sample. Further, organisations in civil society are developing and pioneering innovative practical solutions to thorny problems of service provision and delivery. Again, these structures offer considerable potential.

Whether European policy-makers will overcome the barriers and seize the opportunities for active ageing reform programmes will depend in largely, albeit not wholly, on whether institutional structures and practices enable them to. This, in turn, depends on whether and how policy actors strike a workable balance between the two countervailing institutional tendencies outlined in this paper. The tension between these processes is an unambiguously good thing for social policy-making in Europe. However, there is a real danger that the active ageing policy agenda will be burnt by the friction between these institutional processes. The challenge for policy-makers at all levels, but particularly at European level, will be to design policy processes that constructively use the tension between the two institutional logics to create institutional innovations that benefit Europeans of all ages.

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