

How theories of ageing can influence policy

Key points

- Examining theories of ageing can help us reassess our notions of what ageing is and how we see older people.
- Theories on ageing can help us to understand the focus of social policies and indicate future policy directions.
- Theories of ageing can play a role in policy development by providing a wider context for its formulation.

Introduction

This document presents a summary of the full report *A discussion paper on theories of ageing and approaches to welfare in Ireland, North and South* which was prepared for the Centre for Ageing Research and Development in Ireland by Dr. Maria Pierce and Dr. Virpi Timonen, Social Policy and Ageing Research Centre in Trinity College Dublin.

The paper gives a detailed assessment of current theories of ageing. It discusses how ageing was previously, and is currently, viewed in Northern Ireland (NI) and the Republic of Ireland (ROI). It then examines two major policy areas relevant to older people – pensions and long-term care – through the lenses of various social policy theories of ageing.




Why are theories of ageing important in policymaking?

There are three reasons why theories of ageing can and should play an important role in policy development.

- 1.** Understanding theory is crucial in understanding social policy on ageing. Theories play an important part in understanding and potentially reforming the welfare of the older populations in ROI and NI.
- 2.** Ageing is not only a biological process, but also socially determined. Understanding this can help those involved in policy development to see that social policy has a role to play in determining how people age.
- 3.** While theories are not direct causes of policy, they can help to explain why policies are the way they are, and indicate future directions for policy, drawing on broader thinking on ageing and older people than has previously been the case.

Which theories are discussed?

- 1. Time, age and ageing concepts:** This theory argues that human ageing is too complex to be reduced to chronological time and concepts such as chronological age, life expectancies and old age dependency ratios. There is, therefore, a need to critically examine use of these concepts and to embrace other perspectives of time.
- 2. The life course perspective:** The life course perspective focuses on the connection between individual lives and the historical and socio-economic context within which these lives unfold.
- 3. The political economy of ageing perspective (PEAP):** The political economy of ageing perspective seeks to understand differences in the treatment of older people and to relate these to the political, economic and social systems. The relative power of the state, business, labour and other social groups in society are central concerns to this theory.
- 4. Cumulative advantage and disadvantage theory:** This theory emphasises the role of early advantage or disadvantage in life. As a result of inequalities, some people are advantaged in early life, an advantage that may accumulate over time, whereas others are disadvantaged and these disadvantages may also compound over time.



5. Feminist theories of ageing: There is no single feminist theory of ageing. Feminist approaches to social policy and ageing begin with the argument that any discussion of the field must consider gender issues.

6. The moral economy of ageing perspective (MEAP): The moral economy of ageing perspective directs attention to the collectively shared moral assumptions and popular consensus that legitimate certain practices, and the role they play in the social integration and social control of older people.

7. Post-structuralist theories of ageing: Post-structuralist approaches analyse social policy as a complex and contradictory space. These approaches argue that institutional responses must therefore be more flexible than the traditional welfare state responses.


8. Theories emphasising a sense of meaning: Human beings look for meaning in life and this is particularly significant in later life. This perspective seeks to understand what gives older people a sense of meaning and purpose.

9. Phenomenology of ageing: Social phenomenologists focus their attention on ideas and presumed facts about ageing and how these are understood by the people who experience ageing.

How is ageing constructed?

There are many different ways in which ageing is socially constructed Ireland, North and South, and there are many factors that influence ageing. These factors can be at the individual level, at the organisational level or at a broader level through social policies. Some of the recent developments in how ageing is viewed and influenced are:

- 1. Institutionalised retirement:**
The meaning of age and ageing in modern welfare states has been heavily influenced by national pension systems and the institutionalisation of age-related retirement. This has had both positive and negative effects. On the one hand, retirement is seen as a gateway to a new life of freedom from paid work. On the other hand, it has encouraged a view that past a certain age an individual's economic and social worth is diminished. This has contributed to age discrimination.
- 2. Positive constructions of ageing:**
People are living longer and there have been notable improvements in the overall well-being of older people who are generally healthier, more able and active than before. More positive constructions of ageing are being emphasised by many governments and organisations in recent times.

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- 3. Negative constructions of ageing:** Population ageing is often seen as an economic problem, particularly in relation to the level of state spending on pensions. While positive constructions can lead to older people staying in the workforce for longer, increasing retirement ages can be a negative for some older people, e.g. for those in physically demanding jobs.
 - 4. Older people as consumers:** The private sector plays an increasing role in the provision of long-term care of older people in ROI and NI. This market-oriented approach is often seen as a modern, positive policy measure, which casts older people in a positive way as empowered consumers. However, it is also criticised as leaving older people in a vulnerable position.
 - 5. Ageing as an individual risk:** A lot of debate on pension policy has focused on the balance between public and private responsibility in relation to the financing of income supports in older age. Recent pension reforms in ROI and the UK (applicable to NI) have highlighted the importance of supplementary private pensions. This places a greater responsibility on individuals to provide for their own future and leads to a reconstruction of ageing as an individual risk rather than a collectively shared risk.

What does this mean for policy?

Examining theories of ageing can help us re-assess our notions of what ageing is and how we see older people. They can play a role in the policy development process in providing a wider context for policy formulation. This section shows how the theories can contribute to policy in two areas- pensions and long-term care.

Pensions

Viewing older people as a diverse group: In both NI and ROI, chronological age is used to regulate state pensions and other welfare supplements and free schemes. This can contribute to the view that people of the same age are one homogenous group. For example, increasing the retirement age has a far greater impact on physical labourers than on office workers, but the policy does not take account of this.

Allowing more flexibility in working life: The moral economy of ageing perspective, argues for greater flexibility with respect to retirement age and sees this is a crucial feature of pension policy. Pension systems should be designed so that working later in life leads to a higher retirement pension, while retiring earlier should mean a lower pension. As part of this, governments should allow for greater



flexibility and foster part-time working for older people.

The life course perspective suggests ways in which life's challenges may be spread more evenly across our life course. These can be achieved through raising the retirement age in line with increased longevity, which can then allow for greater flexibility in employment patterns.

Sharing the risks of retirement:

Promoting private pensions shifts responsibility for retirement away from states to the individual. From a political economy of ageing perspective, this amounts to blaming older people for pensioner poverty. The cumulative advantage and disadvantage theory also holds that people who are disadvantaged at an early stage continue to be so, and so should not have to shoulder the burden of pensioner poverty. Proponents of this perspective favour a universal social insurance model.

Addressing equality issues: Feminist theories have drawn attention to social policies that institutionalised and reinforced women's exclusion from the labour market and social security. Governments have gone some way to address issues raised by these feminist perspectives, e.g. through adapting the state pension system to account for time spent as a carer.

Taking account of older people's opinions and experience:

The phenomenology of ageing theory emphasised the importance of taking account the subjective experience of older people when developing ageing policy. This can highlight the impact of ageing policies at the individual level.



Long-term care

Developing long-term care to suit everyone:

From a political economy of ageing perspective, neither ROI nor NI has a universal long-term care system that would guarantee equal access to all older people. Similarly, neither country has a long-term care insurance system whereby individuals would be entitled to a level of service or payments corresponding to their need for care. As it stands, provision relies heavily on means tests and co-payments.

Acknowledging the role of women in care:

Feminist theories draw attention to the importance of unpaid work, primarily carried out by women within the family home, and raise substantive issues facing older women as both providers and recipients of care. Currently, policy is underpinned by an assumption that the family will take most responsibility for the care of older people.

Assessing the fairness of long-term care policies:

The moral economy of ageing perspective draws attention to the question of whether it is fair to expect older people who have a limiting long-term condition to bear the cost of co-payment for home-based and institutional care. The alternative policy approach is to share the cost more equally among the population through a system of long-term care insurance.

Hearing older people's views on long-term care:

Older people's opinions are increasingly being requested to inform the policymaking process. For example, in ROI focus groups were held with nursing home residents in institutional care settings to hear their views on the key issues relating to safety and quality of care in such care settings. Developments such as these fit well with phenomenology of ageing perspectives. While such focus groups are taking account of subjective experience, older people's sense of meaning and wellbeing is often under-emphasised in official policy.



Conclusion

This paper provides a number of interesting discussion points for researchers, theorists and all those involved in policy development relating to ageing:

1. Should policy development be more firmly based on recognised theoretical perspectives? Why?
2. How can theories be fed into the process of formulating policy for older people in NI and the ROI?
3. What effect will the positive and negative constructions of ageing have on policymaking for older people?
4. To what degree are policymakers and others involved in policy development influenced, or willing to be influenced, by contemporary theoretical thinking (which is continually developing)?
5. Is there a danger that different stakeholders will pick a single theory of ageing, while ignoring others?
6. What is the best strategy for bringing the breadth and value of theoretical knowledge to bear on policy development?

It is important that policymakers and others are kept aware of new thinking and theories that can assist in developing policy. As part of this, theories must be shown to have practical applications for policy development. Those involved in developing policy should also look beyond immediate political or financial factors to broader influences, such as those offered by social theories of ageing. If this is achieved, the theories can be helpful in the complex work of developing and reforming policy for older people in the Republic of Ireland and Northern Ireland.

**To read the full report,
please visit: www.cardi.ie**



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