



EUROPEAN CENTRE FOR SOCIAL WELFARE POLICY AND RESEARCH AFFILIATED TO THE UNITED NATIONS

# 2015 2016

# REPORT OF

ANNUAL



## PROGRAMME OVERVIEW

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### Activities and Overview 2015 / 2016

Completed, Ongoing and Planned Status as of September 2015

### Research Programme "Work, Wealth, Welfare"

### Head of Research Programme Research Staff

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International Research Project and Network EUROMOD: European Tax-Benefit Model

(funded by the European Commission, DG Employment, Social Affairs and Inclusion) 1999 –

International Research Project and Network **EUROMOD Update 2** 

(funded by the European Commission, DG Employment, Social Affairs and Inclusion) 2012 – 2015

### National Research Project **SORESI**

Developing a web-based tool for policy-makers and the broader public in Austria to simulate policy reforms and to analyse their social impact

(funded by the Austrian Federal Ministry of Labour, Social Affairs and Consumer Protection) 2012 –

International Research Project Corridor Studies on Portability of Social Benefits

(funded by The World Bank) 2013 - 2015

### International Research Project Social Situation Monitor

Analysing trends in income distribution, poverty, social exclusion and material deprivation as well as health across the European Union

(funded by the European Commission, DG Employment, Social Affairs & Inclusion) 2013 – 2016 International Research Project **Mobilising the Potential of Active Ageing in Europe (MOPACT)** Aiming to provide the research and practical evidence upon which Europe can make longevity an asset for social and economic development

(funded by the European Commission, Seventh Framework Programme and the TOP.EU programme of the Austrian Federal Ministry of Science, Research and Economy) 2013 – 2017

International Research Project Neuordnung der bedarfsorientierten Sozialtransfers und aktivierende Interventionsformen in Südtirol

(Rearrangement of Demand-Oriented Social Transfers and Activating Interventions in South Tyrol) (funded by the European Social Fund) 2013 – 2015

International Research Project Families in the Economic Crisis Mapping policy responses in 5 "flexible" European Union Member States

(funded by the European Foundation for the Improvement of Living and Working Conditions) 2014 – 2015

International Research Project Promotion of Older Workers' Employability and Postponed Retirement

(funded by the Institute for Economic Research, Slovenia) 2014 – 2015

### **Research Programme "Work, Wealth, Welfare"**

### **Overarching Aim**

To develop and take forward work in the overlapping research fields of **Work** (e.g. employment promotion; earnings differentials; social protection for labour market absences; in-work benefits and their usefulness for work incentives; ageing and employment; employment of people with disabilities); **Wealth** (including income maintenance; accumulation of income; physical as well as pension wealth; impact of income and wealth on personal welfare, etc.); and **Welfare** (e.g. design and implementation of social security and welfare programmes and their impact on reduction of poverty and social exclusion; social rights and entitlements; poverty and social exclusion among migrants and people with disabilities). This research programme – undertaken by working closely with national policy-makers and international (research) organisations, and with the help of the commissioned research, internal research as well as conferences and seminars – enables us to identify and advise on key social welfare policy reforms that are necessary within the wider bloc of European countries, including not just the EU Member States but also Central Asian and Balkan countries.

### Specific Objectives

- To improve our understanding of the working of the labour market, and drawing out the implications for future policy developments, so as to achieve a more flexible and better performing labour market, which supports goals such as achieving sustainable economic growth, with additional and better jobs and greater social inclusion of people at the margin of the labour market (in particular for persons with disabilities and migrants).
- Identify and explore sources of income and wealth generation within and across countries, and within and across generations, by studying key research issues and policy developments such as women and pensions; intergenerational transfer of disadvantages; shifts in pension policies and their impact on pension wealth and retirement incomes; risks of poverty and social exclusions across countries, in particular among older people, and the mainstreaming of ageing and social inclusion policies and their impact).
- Inform future policy developments by understanding the design, implementation and impact of social welfare policies; and by identifying good policy practices across countries (in particular those which resulted in reducing poverty and social exclusion amongst vulnerable groups of societies); and
- To work out and support the development of the analytical tools that are required in assessing policy developments across different fields of social welfare policy and research (e.g. maintenance and extension of the microsimulation models and other such tools and data sources; and by developing social indicators so as to monitor progress and policies).

We organise our work programme within various research areas. The broad description of the research areas is set out below.

### I. Ageing & Generations

This research area seeks to facilitate a dialogue across generations within a multidisciplinary setting so as to study implications of ageing of societies. The intergenerational and interdisciplinary perspective allows us to better understand and prepare for challenges and opportunities associated with the demographic shift of population ageing that European countries are experiencing.

MOPACT – Making Longevity an Asset for Economic and Social Development – is a fouryear European research project (2013-2017) involving various universities, institutes, public authorities and the European Centre. The joint research intends to create a high-quality, multi-disciplinary critical mass of leading researchers in the closest possible partnership with stakeholders. Through a carefully planned iterative process, MOPACT will build a compendium of essential state-of-the-art and foresight intelligence upon which to develop the policy, practice, service and product developments and innovations required to make longevity an asset for social and economic development. The "Work, Wealth, Welfare" team participates in WP1 (Realising Active Ageing) and WP3 (Extending Working Lives). Our work in WP3 has so far included preparing a country report on the Netherlands for the conceptual framework (Deliverable 3.1), a paper on life-long learning in the Netherlands, and a compendium of good practices focusing on public and company initiatives targeting older workers in the Netherlands (Deliverable 3.2)

Our formal collaboration with the UNECE Population Unit continued during 2014 and 2015. As a member of the UNECE Working Group on Ageing (WGA), the European Centre has been actively involved in the work of the WGA providing scientific expertise, participating in annual meetings, and contributing to the new WGA Programme of Work for 2014-2017. The European Centre is also currently involved in the work of the UNECE Taskforce on Ageing-related Statistics to improve the availability, accessibility and comparability of statistical data in support of ageing-related policy-making.

### II. Incomes, Poverty & Social Exclusion

This research area addresses the following analytical questions: How best to improve income measurement for the assessment of public policies; How to improve our understanding of people's experiences of poverty and social exclusions; What are good policy practices in combating risk of poverty and social exclusions; and what recommendations can be made for policy reforms that will help countries improve incomes and combat poverty and social exclusions.

Together with its partner from the Austrian Institute for Family Studies, the European Centre has won a bid for research funding from the European Foundation for the Improvement of Living and Working Conditions, for a project entitled 'Families in the Economic Crisis: Mapping Policy Responses in 10 European Member States'. Katrin Gasior will make use of

EU-SILC survey data to provide evidence for each of the countries studied, specifically to identify household types including lone parents, couple families and extended families, and to explore various working patterns and work arrangements of the parents. Pieter Vanhuysse will synthetize the main lessons learnt from all country case-studies in the project. Bearing in mind the different institutional and socio-political settings across the major models of welfare in Europe, he will also derive larger conclusions for family policy design and family welfare during and after crisis periods.

The European Centre continued work as a partner institute within the Social Situation Monitor. The Social Situation Monitor analyses trends in income distribution, poverty, social exclusion and material deprivation as well as health across the European Union. In 2015, the team of the European Centre is responsible for the tasks of (1) monitoring patterns and trends of poverty across the EU, (2) completing a Research Note on "Older Workers", and (3) contributing to a further Research Note on the "Self-employed". The research findings of the SSM, including an on-line resource of the most recent findings, can be found at the website of the European Commission.

In a study on the "Rearrangement of Demand-Oriented Social Transfers and Activating Interventions in South Tyrol" funded by the European Social Fund, the European Centre analysed minimum income regulations and policies in selected European countries including a detailed analysis of the situation in Austria and Germany. Up to date, there has not been any standardisation of basic income models in the EU-28; while there are overlaps in some countries (e.g. most basic income benefits are linked with activation measures), significant differences can be observed.

### III. Labour Market & Social Policy

This research area focuses on the analysis of the functioning of the labour market, and reviewing of the labour market and other social policies to boost employment and incomes. A particular focus is placed on the understanding of the institutional set-up within which labour market and social policies are implemented.

Our focus has been on older workers and policies boosting their labour market participation. We explored different aspects of this highly topical issue in MOPACT (Extending Working Life), and the Social Situation Monitor (Research Note on the Employment of Older Workers).

Moreover, in 2015, the European Centre, in collaboration with the Institute for Economic Research (Slovenia), has prepared a study on the "Promotion of Older Workers' Employability and Postponed Retirement". The purpose of the study has been to contribute to the preparation of a comprehensive strategy for active and healthy ageing in Slovenia. The paper, written by Eszter Zólyomi, Bernd Marin, Pieter Vanhuysse and Katrin Gasior, presented good practices from Austria, Finland and the Netherlands focusing on labour market and pension policies, government programmes and initiatives that aim to increase the employment of older workers and to extend working life. It also identified and recommended potentially transferable policies and measures for Slovenia.

In addition, the Centre has hosted an International Seminar on labour market and social policy by Paul Marx (University of Odense).

### **IV.** Pensions & Social Security

This research area looks into how pensions and other forms of social security provisions ensure income protection against common social risks such as absences from the labour market, divorce, widowhood, and other forms of life-course disruptions. A particular focus is placed on how recent pension reforms in many countries are likely to impact on retirement incomes of future pensioners.

In a project on Corridor Studies on Portability of Social Benefits funded by the World Bank the European Centre was responsible for the corridors Austria/Turkey and Germany/ Turkey. A second set of corridor studies focused on Belgium/Morocco and France/Morocco. An increasing share of the world population will spend some time of working life outside their home country. Lacking portability of acquired social rights threatens human rights, deteriorates individual life cycle planning and social risk management, negatively affects labour mobility, and creates fiscal costs for at least one of the countries. Compared to the respective decrees of the European Union, which represent the most extensive rules on the multilateral level, and other bilateral agreements concluded by Austria and Germany, there are only minor differences in the agreements with Turkey.

In addition, the Centre has hosted an International Seminar on pensions and social security by Wim van Oorschot (Department of Sociology, KU Leuven).

### V. Tax/Benefit Policy Modelling

Here, we focus on our specific research interest of developing tax-benefit types of models as analytical tools to evaluate ex-ante the impact of policy reforms. The most salient aspect of these so-called microsimulation models is that they analyse the redistributive impact of taxes or benefits on individuals or households, answering questions such as "Who are the winners and losers?" of a particular policy reform. Emphasis has been placed on working with the international network that has developed EUROMOD, the European tax-benefit microsimulation model.

During 2015, the European Centre's researchers continued with the EUROMOD Update project, supported by the European Commission. The aim is to update and upgrade the computer-based research tool, and to extend it to cover the whole enlarged European

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Union. The funds are used to raise awareness among researchers, international bodies and governments of how EUROMOD can be applied to measure the impact of tax and benefit policies on people's living standards and ultimately tackle inequality and poverty. In 2015, the focus of the European Centre's team is on modelling the policy system 2015 for Austria, based on national SILC data 2012 (incomes for 2011).

Based on EUROMOD and funded by the Austrian Federal Ministry for Labour, Social Affairs and Consumer Protection the European Centre (together with the project partners ISER/ Essex, FLEMOSI, BRZ and Statistics Austria) developed a web-based tool for policy-makers and the broader public to simulate policy reforms and to analyse their social impact in Austria. It offers the opportunity to play around with potential tax and benefit reforms and to see their effects on the national poverty rate, income inequality indicators and different income groups. In 2015, SORESI was updated to 2015 policy rules using the latest input data (SILC 2013 with incomes for 2012) and complemented by results on the individual level and for model households. Based on the model, the European Centre calculated the effects of the Austrian tax reform 2015/2016 on the income distribution. The analysis was commissioned by the Austrian Ministry of Finance and used for their social impact assessment of the reform and the Ministerial draft bill. The web application can be accessed via: http://soresi.sozialministerium.at/soresi/

### VI. Happiness, Personal and Social Well-being

Our focus here is to evaluate different types of welfare societies and their success in addressing social issues that a country is facing. Emphasis is placed on the analysis of attributes of the European Social Model and how it offers lessons for countries to reform their welfare states.

It has become customary to judge the quality of a society by the use of objective indicators, predominantly socio-economic ones. Yet in most developed nations in Europe and elsewhere, increases in income, health and education have not produced comparable increases in happiness or life satisfaction. To address this issue, we aim to evaluate the success of European countries in promoting the personal and social well-being of their citizens. During recent years, significant progress has been made in the development of high-quality subjective measures of personal and social well-being and the production of cross-national, comparable datasets. Our focus is to understand social patterns and trends of happiness or other indicators of wel-being, the links between objective circumstances and their subjective assessment. We also aim to explore the implications of these issues for policy-makers.

Orsolya Lelkes, in her article titled 'Minimising Misery: A New Strategy for Public Policies Instead of Maximising Happiness?', raises the issue whether public policy should focus on minimizing unhappiness rather than maximizing happiness. Using a cross-sectional multicountry dataset with 57,000 observations from 29 European countries, she shows that unhappiness varies a great deal more across social groups than (high levels of) happiness do. While misery appears to strongly relate to broad social issues (such as unemployment, poverty, social isolation), bliss might be more of a private matter, with individual strategies and attitudes hidden from the eye of a policy-maker. (*Social Indicators Research*, October 2013, Volume 114, Issue 1, pp 121-137)

### VII. Welfare Society

A book presenting the outcome of a scientific symposium at the occasion of the 40th anniversary of the European Centre for Social Welfare Policy and Research, 15 September 2014, is under preparation. During this jubilee event, a large number of well-known European academics delivered contributions to the overarching theme of "The Future of Welfare in a Global Europe".

Besides an extended Introduction by the Editor Bernd Marin, the volume is structured into seven parts: Part I: From Warfare to Welfare and Workfare (Herbert Obinger and Klaus Petersen) – Part II: Demographic Metabolism, New Measures of Age and Ageing, and the Active Ageing Index (AAI) 2012-2015 (Wolfgang Lutz / Warren C. Sanderson and Sergei Scherbov / Asghar Zaidi) – Part III: Towards a Human Investment State: Future-Able Education, Skill Formation, and Economic-Financial Literacy as Prerequisites of Sustainable Welfare Society (Marius R. Busemeyer / Pieter Vanhuysse / Elsa Fornero) – Part IV: Class, Generation, Gender, and Age Cleavages in Ageing Societies (Martin Kohli / Agnieszka Chłoń-Domińczak / Alexia Fürnkranz-Prskawetz) – Part V: Too Sick to Work? Disability – and Happiness – in Stressful and Long-Life Societies (Christopher Prinz / Orsolya Lelkes) – Part VI: Fragile Welfare Sustainability: Two Model Cases in Point (Joakim Palme / Bert Rürup) – Part VII: No European Social Model in Europe – or towards a Social Union? (Bernd Marin / Frank Vandenbroucke).

### Research Programme "Health and Care"

### Head of Research Programme Research Staff

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### International Research Project

Addictions and Lifestyle in Contemporary Europe – Reframing Addictions Project (ALICE RAP) Analysing the place and challenges of addictions (substances and gambling) and lifestyles to the cohesion, organization and functioning of contemporary European society

(funded by the European Commission, Seventh Framework Programme and the TOP.EU programme of the Austrian Federal Ministry of Science, Research and Economy) 2011 – 2016

### National Research Project AGORA – Wie lässt sich die Öffentlichkeit für Jugendliche und Erwachsene gesundheitsfördernd gestalten?

(How to Build a Health-promoting Public Sphere?) (coordinated by the European Centre for Social Welfare Policy and Research, in cooperation with the Universities for Applied Sciences in Vienna and St. Pölten, Austria) (funded by the Austrian Health Promotion Fund / FGÖ, the Viennese Institute for Health Promotion / WIG, and the Lower Austrian Health and Welfare Fund / NÖGUS) 2012 – 2015

National Research Project Pflegebedarf und Versorgungsmix in Wien

(Demand for Long-term Care and Supply Mix in Vienna) (funded by the City of Vienna, MA 24) 2012 – 2014

International Research Project Social Situation Monitor – Research Notes on Access to Long-Term Care Services and the Health Status of Older European Workers

2014 - 2015

### International Research Project

**Mobilising the Potential of Active Ageing in Europe (MOPACT)** Aiming to provide the research and practical evidence upon which Europe can make longevity an asset for social and economic development

(funded by the European Commission, Seventh Framework Programme and the TOP.EU programme of the Austrian Federal Ministry of Science, Research and Economy) 2013 – 2017

International Research Project Long-term Care Markets and Integrated Care – Policy Utopia or a Goal within Reach?

(funded by the Swedish Ministry of Health and Social Affairs) 2014 – 2015

International Research Project

INNOVAGE - Social Innovations Promoting Active and Healthy Ageing ICT-based Social Support for Carers of Older People Address the current major barriers to innovation and to the achievement of extension of healthy life years across the EU

(funded by the European Commission, Seventh Framework Programme) 2014 – 2015

National Research Project

Serbian Project SAVE – Social Protection Assessment for Values and Effectiveness Cost-effectiveness and cost-efficieny of the social welfare system, specifically deinstitutionalization (DI) of welfare services in Serbia

(funded by the European Commission, PROGRESS Programme) 2014 – 2016

National Research Project "Gute Pflege" aus Sicht der Beschäftigten

("Good Care" from the Care Workers' Perspectives. Preconditions, Aims and Perspectives for Quality Improvement in Long-term Care) (funded by the Chamber of Labour for Vienna) 2014 – 2015

International Research Project Scoping Study on Communication to Address and Prevent Chronic Diseases

(funded by DG Santé, formerly DG SANCO – European Commission) 2014 – 2015

International Research Project Review of the State of the Art on ICT-enabled Social Innovation in the Domains of Prevention, Health Promotion and Rehabilitation within the Area of 'Active and Healthy Ageing and Long-term Care for Older People'

(Funded by JRC-IPTS in collaboration with DG EMPL – European Commission) 2015

International Research Project Coordinated / Integrated Health Services Delivery In-depth Description of the System Enabler 'Incentives'

(funded by the WHO Regional Office for Europe) 2014 – 2015

### **Research Programme "Health and Care"**

The Health and Care programme of the European Centre, guided by Ricardo Rodrigues, has continued to broaden the scope of research topics covered by the entire team. Based on the long-standing focus on long-term care and substance addiction, new fields of research related to health care policies have been opened up. In particular, the scope of applied and comparative research has been extended to health systems and health promotion in general, to opportunities offered by ICT in health and long-term care, as well as to the impact of the financial crisis on public health and access to care. This expansion in focus has implied an extension of networking activities and the creation of new partnerships covering EU agencies such as the Joint Research Centre, Institute for Prospective Technological Studies (JRC-IPTS), European stakeholder organisations such as AGE Platform and Eurocarers as well as the international consultancy firm ICF International, to name a few. At the same time, dissemination efforts have been intensified by an extended number of peer-reviewed articles as well as policy briefs, articles in stakeholder organisation journals, contributions to books, and presentations at major conferences across Europe from Dublin to Moscow and from Oslo to Sevilla.

To keep this dynamic development sustainable, the Health and Care programme constantly monitors relevant calls for tender and participates in national and European bidding procedures with its network partners. Furthermore it is closely involved in the development of the European Centre's new orientation to strengthen its bridge-building function with regard to countries of the UN-European region that are not yet Member States of the EU.

### **Overarching Aim**

The strategic aim of the Health and Care programme is to contribute to the establishment of evidence-based policies in the field of health and long-term care by carrying out multidisciplinary research of outstanding quality, including issues less explored by mainstream research. These activities are chiefly designed to assist policy-makers at the national and international level in informed decision-making. This includes research on emerging topics, the identification of innovative potentials of new approaches in social innovation, ICT applications and preventative strategies. By doing so, it is indispensable to recognise the role played by the various stakeholders and to involve those who are most affected by reforms, new initiatives and policies. Research by the Health and Care programme therefore always seeks to incorporate their contributions and feedback.

### Addressing Policy Challenges

This orientation was underlined during the reporting period from 2014 to 2015 by new and ongoing research focusing on the following general and specific challenges for policy-makers in the area of health and care.

### Are competion and choice compatible with promoting integrated care?

The study on 'Competition, Choice and Integrated Care' was commissioned by the Swedish Ministry of Health and Social Affairs to investigate whether increasingly fragmented care markets that promote user choice and competition between providers are compatible with the policy goal of integrating health and long-term care. Based on about 20 expert interviews in Dortmund and Leipzig in Germany and Norrtälje in Sweden, it was shown that market-oriented governance and user choice have prompted different reactions depending on the national and local framework conditions. While competition and choice may constitute a barrier to integrated care in some cases, they may also be considered as drivers for providers and regulators to develop new types of collaboration and inter-organisational coordination. Still, regulators are strongly advised to proactively develop and fund such mechanisms – employing methods ranging from 'round tables' to 'case management' and one-stop information points for users – to counteract market-failure and to improve outcomes for users.

### Can financial incentives boost coordinated and integrated health services delivery?

As a contribution to the development of a Framework for Action towards Coordinated/ Integrated Health Services Delivery (CIHSD) by the WHO Regional Office for Europe, the European Centre provided evidence-based knowledge to underpin the Framework's concepts and strategies by analysing (financial) incentives for purchasers/commissioners, providers and patients/users. Based on an intensive literature study, a general trend towards moving away from 'fee-for-service' reimbursement was identified, but further research is needed to improve mechanisms to steer and monitor 'bundled payments', 'Accountable Care Organisations' or other ways of 'value-based purchasing'.

### Is long-term care ready for social innovation and investment?

Within the FP7 project MOPACT, the work package on 'Long-term Care and Social Support' aims at identifying potentials for social innovation in eight EU Member States. Following a report on general framework conditions, a large number of examples for social innovation were found, some of which were further analysed to determine inhibitors and drivers for their innovative approaches. Based on several focus groups in the participating countries, national priorities were mapped by the relevant stakeholders and synthesised in a European overview report that will feed into scenarios for future improvements.

Complementing the research described above, another project carried out by the Health and Care programme, part of a pan-European IESI project coordinated by the Joint Research Centre of the European Commission, involved a systematic review of the state of the art with regard to ICT-enabled social innovation in the area of active ageing and long-term care. Findings from the review revealed that ICT-based solutions are garnering increasing

recognition as useful components – and in some cases as drivers – of innovative initiatives in many European countries, yet the lack of standardised and rigorous guidelines for evaluating ICT-enabled services and products, and a lack of policy priority afforded to such solutions and weak infrastructure at the national level, are hampering the diffusion of such services.

### What is the relationship between social engagement and health status among older age cohorts?

The work package addressing health and well-being of older people within the MOPACT project seeks to disentangle the link between the social participation of older people and their overall health, with a focus on the social participation domains of informal care provision, labour market participation, participation in volunteer and leisure activities, and religious participation. Employing both quantitative and qualitative methods, including analysis of SHARE data, expert interviews and focus groups, this research contributes to a better understanding of the determinants of disease, disability and frailty among older adults, and the pathways through which social engagement, or the 'activation' of older people, can influence their health. The study focuses on select countries in Europe, thereby enabling a comparative analytical approach.

### What constitutes 'good care' from care workers' perspectives?

This national study was commissioned by the Chamber of Labour for Vienna and represents the first Austrian study to gather the views on quality of care from the various professional groups involved in long-term care delivery in residential and community care. Based on a number of explorative interviews, including with live-in migrant carers, and five workshops in various Austrian regions with representatives of long-term care professionals, a catalogue of 'Good Care from A to Z' was compiled identifying themes influencing the quality of care, as well as a long list of recommendations for further improvement. These recommendations were complemented by family carers' perspectives gathered during a group discussion. Collectively, the group discussions demonstrated the need for further dialogue between different stakeholders in order to enhance mutual understanding at the interface between the individuals' life world and the professionals' perspective, a perspective that is shaped by educational backgrounds, challenging working conditions and market-oriented service delivery as well as by uncoordinated regulatory and financial frameworks.

### How can deinstitutionalisation be realised in care for children and older people in need of long-term care?

This project, funded by the EU-PROGRESS programme of DG Employment, Social Affairs and Inclusion, was carried out under the leadership of the Serbian Research Institute of Social Policy and looked into opportunities for providing care to children and older people with long-term care needs in the community, rather than in institutional settings.

Based on a policy paper that highlighted contextual conditions and practice examples from across Europe, a workshop and a study tour in Austria were organised to illustrate potential solutions for improvement and to elaborate on priority actions in Serbia. The recommendations and findings from these activities, publications and other events (including a final conference with 80 participants) will feed into the policy-making and legislative processes, and support further legislative developments in the area of cost-effectiveness in Serbian social welfare.

### How can carers be effectively informed about their rights and opportunities?

In the framework of the FP7 INNOVAGE project, the European Centre has been involved in developing and testing a multi-lingual website that will be implemented in all 28 EU Member States with both common content and country-specific information. The website comprises content related to caregiving activities and coping strategies, but also provides interactive tools allowing informal carers and other target groups (i.e. care professionals and employers of working carers) to communicate, share their experiences and support each other. Before officially going online, the website will be presented to and validated by representatives of carers during workshops in several participating countries, including Austria.

### What is the impact of inequality and inequity in the use of long-term care in Europe?

A research note for the EU Social Situation Monitor addressed inequities in care access, i.e. inequalities that can be deemed unfair, unnessary and avoidable. Using SHARE data, differences between European countries in the use of long-term care by older people living at home were analysed across income groups and across need levels. For this purpose, concentration indices, concentration curves and horizontal inequity indices were estimated for home care services and informal care. The findings for 11 EU Member States suggest that differences in use of home care services across income groups mostly reflect differences in need between those same groups. For informal care, the differences in use persist even after accounting for needs, and less affluent individuals are much more likely to use informal care. From the point of view of public policy, these results raise some concerns as they may hint at greater difficulties of using services by lower-income frail older people despite the availability of universal cash benefits.

### How to build a health-promoting public sphere?

This project, under the acronym AGORA, is funded by various Austrian agencies and tries to translate findings of a previous study on 'Juvenile Alcohol Scenes' into policies and practices by establishing sustainable structures of collaboration between relevant stakeholders shaping the public sphere, namely police and social services but also media and the

hospitality industry. The focus is on bringing together these stakeholders to build channels of collaboration to address the consequences of legal and illicit drug use, including tobacco and alcohol use: for instance public intoxication and nuisance, and violence. To achieve these aims, a mix of methods is used to facilitate and underpin the creation of trust and mutual understanding by contextual knowledge generated from, among other things, participant observations of selected stakeholders' activities in the public sphere, qualitative interviews and group discussions, and a number of working groups with relevant stakeholders at the local and state levels.

Shifting from Austria to the EU-level, the Health and Care programme participated in a scoping study on the use of cross-border communication campaigns to address and prevent chronic diseases, funded by DG Santé. Following the initial phase of the study which included a systematic policy and literature review, and the development of a set of Key Design Principles for building more effective communication campaigns by external project partners, focus groups were held with experts from a range of professional backgrounds, including clinicians, media and communications strategists, and representatives of relevant EU health promotion associations, in order to validate the Key Design Principles, and to gauge their usability for contributing to a health-promoting sphere reaching across Europe.

### How to stimulate a broad debate on science-based policy approaches to addictions?

The EU FP7 research project 'Addictions and Lifestyle in Contemporary Europe' (ALICE-RAP) aims at promoting well-being through a synthesis of knowledge to redesign European policy and practice to better address the challenges posed by substance use and addictive behaviour. The project started in 2011 and has since produced a large number of reports, systematic reviews and case-studies with detailed information and analyses of the various issues that shape substance use and addictive behaviour across 25 European countries, across times and ages, and across the wide range of addictions. This wealth of knowledge will be presented by a series of publications and at a final conference in Spring 2016.

### Outlook

While a number of the ongoing projects will continue into 2016, future activities will build upon the findings of current research with a focus on the following areas:

- the impact of cash benefits on opportunities for user choice,
- designing and governing integrated care delivery under market-conditions,
- social innovation in Central and East European health and long-term care systems,
- quality development in long-term care,
- health promotion in the public sphere.

### Heads of Project EC

Project Coordinator EC Research and Technical Staff Eszter Zólyomi Bernd Marin Eszter Zólyomi René Czerny Michael Fuchs Katrin Gasior Kai Leichsenring Orsolya Lelkes Ricardo Rodrigues Sebastian Ruttner Andrea E. Schmidt Willem Stamatiou zolyomi@euro.centre.org marin@euro.centre.org zolyomi@euro.centre.org czerny@euro.centre.org fuchs@euro.centre.org gasior@euro.centre.org leichsenring@euro.centre.org lelkes@euro.centre.org rodrigues@euro.centre.org ruttner@euro.centre.org schmidt@euro.centre.org

### Expertise, Monitoring, and Evaluation

Mainstreaming Ageing: Indicators to Monitor Implementation (MA:IMI) Monitoring the Regional Implementation Strategy (RIS) for the Madrid International Plan of Action on Ageing (MIPAA)

(in cooperation with the UN Economic Commission for Europe / UN-ECE)
Phase I: 2003 – 2008 (Follow-up and Monitoring)
Phase II: 2008 – 2012 (Second Review and Appraisal Cycle)

The 1st Meeting of the Preparatory Committee for the 2007 UNECE Ministerial Conference on Ageing

12-13 July 2007, Geneva, Switzerland

The Meeting of the Bureau of the Preparatory Committee for the 2007 UNECE Ministerial Conference on Ageing

8-9 October 2007, Geneva, Switzerland

A Special Session during European Centre's GAM on the Review and Progress of the 1st Phase of the MA:IMI Project and Its Continuation into the 2nd Phase

27 October 2007, Vienna, Austria

The 2007 Ministerial Conference on Ageing: "A Society for All Ages: Challenges and Opportunities"

6-8 November 2007, León, Spain

Special Side Event on the Progress and Future of the MA:IMI Project during the 2007 Ministerial Conference on Ageing

6-8 November 2007, León, Spain

The Forum of Civil Society on Ageing

6-8 November 2007, León, Spain

Special Session on Pension Issues at the 30th General Conference of the International Association of Research in Income and Wealth

24-30 August 2008, Portoroz, Slovenia

### Follow-up and Meetings for the Second Review and Appraisal Cycle 2008 - 2014

High-Level Expert and Policy-Makers Conference Reinventing Retirement: Reshaping Health & Financial Security for the EU 27 and Eastern Europe

(funded by AARP and the Austrian Federal Ministry of Science and Research) 23-24 October 2008, Dürnstein, Austria

### First Meeting of the UNECE Working Group on Ageing

1-2 December 2008, Geneva, Switzerland

#### First Meeting of the Bureau of the UNECE Working Group on Ageing

11-12 May 2009, Bratislava, Slovak Republic

### International Expert Meeting - Monitoring Long-Term Care for the Elderly

6-9 September 2009, Jerusalem, Israel

### Second Meeting of the UNECE Working Group on Ageing

23-24 November 2009, Geneva, Switzerland

Workshop "Long-term Care in Europe - Discussing Trends and Relevant Issues"

22-23 February 2010, Budapest, Hungary

### Workshop "The Gender Dimension of Poverty"

8 March 2010, Paris, France

### Second Meeting of the Bureau of the UNECE Working Group on Ageing

27-28 May 2010, Sliema, Malta

#### Third Meeting of the UNECE Working Group on Ageing

22-23 November 2010, Geneva, Switzerland

### Workshop "Ageing - Community Services for the Elderly"

20 February – 3 March 2011, Haifa, Israel

### Third Meeting of the Bureau of the UNECE Working Group on Ageing

24-25 March 2011, Madrid, Spain

### Fourth Meeting of the UNECE Working Group on Ageing

21-22 November 2011, Geneva, Switzerland

#### Workshop "Community Services for the Elderly"

5-14 March 2012, Haifa, Israel

#### Fourth Meeting of the Bureau of the UNECE Working Group on Ageing

22-23 March 2012, Brussels, Belgium

#### UNECE Ministerial Conference "Ensuring a Society for All Ages: Promoting Quality of Life and Active Ageing"

18-20 September 2012, Vienna, Austria

### Fifth Meeting of the UNECE Working Group on Ageing

22-23 November 2012, Geneva, Switzerland

### Fifth Meeting of the Bureau of the UNECE Working Group on Ageing

21-22 May 2013, Belgrade, Serbia

#### Sixth Meeting of the UNECE Working Group on Ageing

25-26 November 2013, Geneva, Switzerland

### Sixth Meeting of the Bureau of the UNECE Working Group on Ageing

8-9 May 2014, Valetta, Malta

### Seventh Meeting of the Bureau of the UNECE Working Group on Ageing

7-8 May 2015, Gdansk, Poland

Further Activities

Support in Preparing the Austrian UNECE Conference Room Paper for UNECE's 60th Anniversary, Presented at the 62nd Annual Formal Meeting

Editing and Dissemination of the Madrid Book "Mainstreaming Ageing: Indicators to Monitor Sustainable Progress and Policies" (finalising authors' contributions to the book; drafting lead chapter 'Trends and Priorities of Ageing Policies in the UN-European Region', etc)

Editing and Dissemination of the Book "Well-being of Older People in Ageing Societies"

Editing and Dissemination of the Book "New Frontiers in Microsimulation Modelling"

Editing and Dissemination of the Book "Women's Work and Pensions: What is Good, What is Best?"

Editing and Dissemination of the Book "Facts and Figures on Long-Term Care"

Editing and Dissemination of the Book "Facts and Figures on Healthy Ageing and Long-Term Care"

Updating of the Monitoring RIS Website

International Exchange International Seminars

http://www.euro.centre.org 2006 – 2014

> Herbert Obinger Warfare and the Welfare State: Causal Mechanisms and Effects

5 June 2014

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Martin Kohli

Cleavages and Conflicts in Aging Societies: Generation, Class, or Age?

15 May 2014

Achim Kemmerling

The Political Economy of Reversing Pension Reform: Why Do Some Countries Renationalize and What Does it Imply for Policy Diffusion Research?

5 December 2013

Louis Chauvel Welfare Regimes, Birth Cohort Imbalances and the Scarring of the Younger Generations

13 June 2013

Markus Knell Increasing Life Expectancy and Self-stabilizing Pension Systems

30 April 2013

Dimiter Philipov, Anne Goujon & Paola Di Giulio Ageing Dynamics of a Human-Capital-Specific Population: The Case of Italy

24 January 2013

Roland Sigg From Ageing as a Crisis to a Long-Life Society: The Evolving Ageing and Longevity Paradigm and Impact on Policies

19 November 2012

Ariela Lowenstein Generational Intelligence

21 September 2012

Rocio Fernández-Ballesteros Active Ageing. Conceptual and Methodological Issues

7 September 2011

Robert Holzmann Severance Pay Programmes across the World: History, Rationale, Status, and Reforms

8 April 2011

Activities and Overview 2015 / 2016: MAINSTREAMING AGEING

Judit Vall Castello Business Cycle Effects on Labour Force Transitions for Older People in Spain

I February 2011

Bernhard Casey Are We All Confucianists? Similarities and Differences between European and East-Asian Policies for Care of the Frail Older People

23 July 2010

Robert Holzmann Portability of Pension, Health, and other Social Benefits: Facts, Concepts, Issues

29 June 2010

Pieter Vanhuysse

Elderly Bias, New Social Risks, and Spending Priorities: Investigating Change and Timing in Eight Programs across Four Worlds of Welfare, 1980-2003

22 July 2009

Achim Goerres The Political Participation of Older People in Europe: The Greying of Our Democracies

8 October 2008

Markus Tepe Traveling without Moving? Pension Regime Change in Ageing Welfare States

3 October 2008

Herwig Immervoll Gender Inequalities and the Allocation of Market Work within Households

3 July 2008

Robert Laslett

Personal Accounts to Improve Pension Coverage and Adequacy: The UK's Proposed Pension Reforms and Lessons for other EU Countries

II June 2007

John Hills Pension Reform in the UK: Challenges, choices and progress

2 March 2007

Joshua M.Wiener Quality Assurance Systems for Long-Term Care: An International Perspective

27 June 2006

Robert Holzmann Pension Reform in Europe: Need and Options for a More Coordinated Reform Approach

8 June 2006

### Mainstreaming Ageing: Indicators to Monitor Implementation (MA:IMI)

First Phase of the MA:IMI Project: Follow-up and Monitoring of MIPAA / RIS

The European Centre has been mandated to undertake various follow-up activities of the so-called "Madrid International Plan of Action on Ageing" since 2002. In the first phase, this work was supported by the Austrian Government (through the Ministry of Social Security, Generations and Consumer Protection and the Ministry for Foreign Affairs). The work had been undertaken with a formal collaboration and the assistance of the UNECE, Geneva, and the newly defined Task Force.

In the first review and appraisal cycle of MIPAA and RIS in the period between 2003 and 2007/2008, the European Centre provided technical support and helped to review the implementation of the Plan by the UNECE's Member States, by a monitoring process based on effective exchange of information, experiences and best practices. The European Centre provided keynote speeches and discussions during several specialised sessions of the 2007 UNECE Ministerial Conference on Ageing in León, Spain. This conference was attended by ministers and high-level officials from 45 UNECE Member States and the European Commission, international organizations, non-governmental organizations and other stakeholders. Discussions included progress achieved in the implementation of the Regional Implementation Strategy for the Madrid International Plan of Action on Ageing adopted at the 2002 Ministerial Conference in Berlin. The Conference also adopted the Ministerial Declaration "A Society for All Ages: Challenges and Opportunities".

The European Centre's project "Mainstreaming Ageing: Indicators to Monitor Implementation" was specially staffed for this work programme and in the course of the project many additional researchers, administrative and technical staff contributed to the work programme. While this programme of work would not have been possible without the generous support of the Austrian host Government as well as that of the Spanish authorities and of UNFPA, the major part of the human resources operating was provided by the European Centre itself, requiring a doubling of the basic endowment offered by the Republic of Austria to the European Centre.

Briefly, the European Centre had undertaken the following tasks during the 1st phase of the MA:IMI project:

- Prepared annual reports and conference room papers for the UNECE Secretariat.
- Promoted exchange of information among experts, policy-makers and civil society by (co-)organizing and participating in various international conferences, workshops, expert and Task Force meetings. For example, the MA:IMI team contributed towards the preparation of the 2007 Ministerial Conference on Ageing: "A Society for All Ages: Challenges and Opportunities" (6-8 November 2007, León, Spain). Also, contributions were made during the 3-day conference, including a special side event, i.e. "Progress and Future of the MA:IMI Project", disseminating information about the work programme of the project.

- Developed a set of agreed-upon "indicators of achievement" (in particular in the areas of demographic changes, income and wealth, labour market and early retirement, sustainable social security, as well as economic growth, financial and social sustainability); collected and analysed data for these "indicators of achievement" and visualized the findings by charts.
- Created "country profiles" using the indicators of achievement, so as to translate MIPAA and RIS objectives into operational measures and standards by which monitoring of progress in goal achievement can be assessed.
- Organized the dissemination of Mainstreaming Ageing results by the creation and dissemination of a special Website "Monitoring RIS" (http://www.monitoringris.org).
- Produced many "Mainstreaming Ageing" and "A Society of All Ages" publications, including 12 book publications, 2 special reports, 6 policy briefs, and dozens of contributions to books and refereed economic and social science professional journals; also disseminated findings through newspapers, journals, magazines, radio, TV and press conferences.
- Created, together with UNECE, several networks where experts, policy-makers and civil society could meet, such as, for instance, the "National Focal Points on Ageing", the "Task Force", the "NGO Network on Monitoring RIS", several European Centre External Expert Networks for Mainstreaming Ageing Indicators Work, etc.

### Second Phase of the MA:IMI Project: Second Review and Appraisal Cycle of MIPAA / RIS

The second phase of the MA:IMI project started in 2008. Subsequently, a new Memorandum of Understanding between UNECE and the European Centre was signed to initiate this second phase, in March 2009, extending the project until February 2014.

This continuation of work under the MA:IMI project was foreseen to be particularly important because it was linked with the second review and appraisal cycle of MIPAA and RIS with the period between 2008 and 2012 presenting a last window of opportunity for countries to implement the core measures to live up to the goals, objectives and commitments formulated in 2002.

As a member of the UNECE Working Group on Ageing since 2008, the European Centre provided technical assistance and expertise to UNECE to review the implementation of MIPAA and RIS in UNECE Member States.<sup>1</sup> The European Centre's MA:IMI team also provided help and information on various methodological and technical issues. One notable example for this was a 2009 data collection exercise covering all 56 UNECE member countries. It was undertaken by UNECE in collaboration with the European Centre and National Statistical Offices and aimed to update existing statistics and fill in missing data.

I The Working Group on Ageing was established in 2008 with the aim to better integrate country-level expertise on ageing into UNECE work and to ensure that UNECE activities in this field continue to correspond to the needs of Member States. The Working Group is an intergovernmental body and a subsidiary of the UNECE Executive Committee and its members include representatives of national authorities dealing with ageing in the UNECE Member States, as well as representatives of international governmental and non-governmental organisations.

In addition, each year, the MA:IMI team prepared an annual report and presented key findings emerging from the MA:IMI project at the Meeting of the UNECE Working Group on Ageing in Geneva.

An overview of work undertaken in the second phase of the MA:IMI project is summarised below:

- Prepared annual reports and provided technical assistance to UNECE to help to review and evaluate the implementation of MIPAA / RIS in UNECE Member States.
- Promoted exchange of information among experts, policy-makers and civil society by (co-)organizing and participating in various international conferences, workshops, and expert meetings.
- Developed a comparative set of gender-specific mainstreaming ageing indicators and longterm care indicators, and collected and analysed data for these two sets of indicators.
- Produced a number of publications, including three book publications, two EU Presidency Papers and several policy briefs, conference papers as well as journal articles, and disseminated findings through the website, newsletters, journals and at international conferences and workshops.

The European Centre undertook these tasks in continuous collaboration with the UNECE Secretariat and with support from Austria, Belgium, Cyprus, France, Hungary, Israel, Spain and Switzerland.

The work was carried out by the European Centre MA:IMI team (René Czerny, Michael Fuchs, Katrin Gasior, Kai Leichsenring, Orsolya Lelkes, Ricardo Rodrigues, Andrea Schmidt, and Pieter Vanhuysse) and has been coordinated by Eszter Zólyomi, with support and advice from Prof. Dr. Bernd Marin (Executive Director).

Research Programme "Work, Wealth, Welfare"

### EUROMOD: European Tax-Benefit Model

1999 – ongoing

Contact	<u>Orsolya Lelkes</u> (lelkes@euro.centre.org)
Aims	EUROMOD is a multi-country Europe-wide tax-benefit model. This network, coordinated by the <u>Microsimulation Unit at the University of Essex</u> , includes 18 institutions from the 15 EU Member countries.
	EUROMOD provides estimates of the distributional impact of changes to personal tax and transfer policy on either national or European level. Thus, EUROMOD is of value both in assessing the consequences of consolidated social policies and in understanding how different policies in different countries may contribute to common objectives. It is of as much significance in evaluating national policies within a European perspective as in evaluating policies at the level of the European Union.
	The European Centre has participated in various EUROMOD-related projects:
•	The initial model construction project covered all (pre-2004) 15 Member States of the European Union.
•	The MICRESA project ("Micro-Level Analysis of the European Social Agenda") explored the impact of national, social and fiscal policies, and reforms of these policies, on poverty reduction in the original 15 Member States.
	The I-CUE project ("Improving the Capacity and Usability of EUROMOD") expanded and enhanced EUROMOD to enable the incorporation of the 10 new Member States. The key results of the project are published in a book titled "Tax and Benefit Policies in the Enlarged Europe: Assessing the Impact with Microsimulation Models", which is also one of the first systematic collections of studies based on the European tax-benefit microsimulation model, and thus a synthesis of the scientific work of researchers from more than a dozen of countries for over a decade.
	Within the EUROMOD Update project, the Centre's team was responsible for the enlargement of the model to the New Member States of the EU.
	In EUROMOD Update 2, our tasks as the Austrian expert team are to provide an annual update of policy parameters, the Austrian input data (EU-SILC national data) for the model, as well as validation.
Websites	http://www.euro.centre.org/detail.php?xml_id=477 https://www.iser.essex.ac.uk/euromod/microsimulation-unit

### **EUROMOD Update 2**

### Regular update of the Austrian specific part of the EUROMOD model, the tax-benefit microsimulation model for the European Union

2/2012 - 1/2015

Contact	<u>Michael Fuchs</u> (fuchs@euro.centre.org) <u>Katrin Gasior</u> (gasior@euro.centre.org)
Aims • •	in a comparable manner, the effects of taxes and benefits on household incomes and work incentives
	Our Task within the EUROMOD Consortium The EUROMOD consortium consists of the core developer group in ISER (University of Essex), which is directed by Holly Sutherland and the national expert groups of each Member State.
	The EUROMOD consortium consists of the core developer group at ISER (University of Essex), which is directed by Holly Sutherland, and the national expert groups of each Member State. Our tasks as the Austrian expert team are to provide an annual update of policy parameters, the Austrian input data (EU-SILC national data) for the model, as well as validation. In 2015, the focus was on modeling the policy systems 2015 for Austria, based on national SILC data for 2012 (incomes 2011).
	A detailed description of the policy parameters, the micro-database as well as on validation results is provided in the EUROMOD country reports. Download <u>Country Report Austria 2009-2013</u> : http://www.euro.centre.org/data/1389962776_35261.pdf
•	What does EUROMOD Update2 mean? The EUROMODupdate2 draws on the first update round (2009-2011). Its aim is to further develop and update the EUROMOD microsimulation model. The following updates are part of this round: Policy update 2011, 2012, 2013, 2014, 2015 Update to 2010 EU-SILC data (in 2013) and to 2012 EU-SILC data (in 2015)
Websites	How to access EUROMOD? EUROMOD is free for academic and not-for-profit use. For information about accessing EUROMOD please see the ISER website. ISER: <u>https://www.iser.essex.ac.uk/euromod/microsimulation-unit</u> European Centre: <u>http://www.euro.centre.org/detail.php?xml_id=2105</u>
External Head of Project	Holly Sutherland, ISER
Project Team EC	Michael Fuchs, Katrin Gasior
Financed by	European Commission, DG Employment, Social Affairs and Inclusion

### SORESI

Developing a web-based tool for policy-makers and the broader public in Austria to simulate policy reforms and to analyse their social impact

09/2012 - ongoing

Contact	<u>Michael Fuchs</u> (fuchs@euro.centre.org) <u>Katrin Gasior</u> (gasior@euro.centre.org)
Aims	SORESI is a web application for Austria based on the microsimulation model EUROMOD. The aim is to develop a web-based tool for policy-makers and the broader public to simulate policy reforms and to analyse their social impact.
	What would you do if you became the minister of finance or social affairs? Would you implement a flat-tax model? Would you increase family benefits? Would you change employer's social insurance contributions?
	SORESI offers the opportunity to play around with such ideas and to see their effects on the national poverty rate, income inequality indicators and different income groups. For an example please view the Policy Brief " <u>Social Reform</u> <u>Microsimulation (SORESI)</u> ": http://www.euro.centre.org/data/1396346607_61195.pdf
	In 2015, SORESI was updated to 2015 policy rules using the latest input data (SILC 2013 with incomes for 2012), and complemented by results on the individual level and for model households.
	The simulated results for income tax in SORESI were validated in detail with special reference figures provided by Statistics Austria. The validation results according to gender, income groups, tax allowances and tax credits can be downloaded (in German): http://www.euro.centre.org/data/1392113841_18692.pdf
	Based on the model, the European Centre calculated the effects of the Austrian tax reform 2015/2016 on the income distribution. The analysis was commissioned by the Austrian Ministry of Finance and used for their social impact assessment of the reform and the Ministerial draft bill. The working paper (in German) can be found here: http://www.euro.centre.org/data/1434376751_26927.pdf
Website	http://soresi.sozialministerium.at/soresi/
Project Team EC	Michael Fuchs, Katrin Gasior
External Project Collaborators	ISER, FLEMOSI, BRZ
Financed by	Austrian Federal Ministry of Labour, Social Affairs and Consumer Protection

#### **Corridor Studies on Portability of Social Benefits**

#### 2013 - 2015

Michael Fuchs (fuchs@euro.centre.org) Contact An increasing share of the world population will spend some time of working Aims life outside their home country. Lacking portability of acquired social rights threatens human rights, deteriorates individual life cycle planning and social risk management, affects labour mobility negatively, and creates fiscal costs for at least one of the countries. In the country coordination of portability, bilateral (and multilateral) agreements play a key role. However, what they are able to achieve with regard to human rights and economic and social outcomes remains largely unknown. Against this background the project sets up corridor studies as an instrument of knowledge gathering and result analysis. The two bilateral social security agreements between Austria/Turkey and Germany/Turkey may bring substantial experiences, as they have existed for many years in migration intensive corridors. A second set of corridor studies focuses on Belgium/Morocco and France/Morocco. The European Centre is responsible for the corridors Austria/ Turkey and Germany/Turkey. The bilateral social security agreement between Turkey and Germany was Results already concluded in 1964, between Austria and Turkey in 1966. They represent typical recruitment agreements with a broad objective area of application incl. health insurance. After 2010, 3.3% of the Austrian population and 3.6% of the German population had a Turkish migration background. The figures include 1.3% with Turkish citizenship in Austria and 2.0% with Turkish citizenship in Germany (Destatis, 2012a: 7f; Destatis, 2012b: 27ff/63f; Statistik Austria, 2013: 26f). Of persons with Turkish citizenship, in Austria only 5.6% were above 65 years, in Germany 12.1%. According to data from the Austrian and German pension insurances, the return orientation - that was still important for the Turkish working migrants of the first generation - has lost its guiding role in Germany, but not so much in Austria. Of all 29,119 Austrian pensions paid to Turkish citizens in 2012, 15,005 (51.5%) were transferred to Turkey, 9,551 (32.8%) were paid inside Austria and 4,445 (15.3%) were transferred to Germany. In total, 15,772 pensions with a yearly value of EUR 68.0 million were transferred to Turkey. In December 2012, Germany paid 355,000 pensions to Turkish citizens. Thereof only 59,000 pensions (17%) worth EUR 346 million annually were transferred outside Germany.

The average pension paid to Turkish citizens is clearly below the average of all Austrian/German pensions paid. By trend, the wages and the resulting remuneration points of insured persons with Turkish citizenship are lower compared to Austrian/German citizens. In addition, the employment biographies are shorter, possibly due to immigration in adulthood. Especially for Turkish women, the combination of low wages (often with reduced working hours) and rather short insurance biographies leads to low old-age pensions.

Compared to the respective decrees of the European Union, which represent the most extensive rules on the multilateral level, and other bilateral agreements concluded by Austria and Germany, there are only minor differences in the agreements with Turkey:

- A pension transfer outside Germany is not possible for pensions related to the reduction in earnings capacity, which are granted under consideration of the labour market situation in Germany.
- For the calculation of pensions, according to the bilateral agreements only the direct method is used. However, in many cases there are no resulting differences to the pro-rate method that is used on the EU-level in most cases in addition.
- The bilateral agreement between Germany and Turkey does not contain a regulation for insurance periods of less than 12 months. Thus, those periods are forfeited.
- For the duration of a regular residence in Turkey, Turkish citizens are only entitled to voluntary insurance in the German pension insurance, in case they have already paid at least a voluntary contribution before the commencement of the supplementary agreement in 1987. In other German agreements (e.g. with Israel, USA), there is a principal entitlement to voluntary insurance under certain pre-conditions, even in case of residence outside Germany.
- Related to the objective of fiscal fairness between countries, the agreed acrossthe-board accounting for the reimbursement of health care costs for pensioners and their dependents between Austria and Turkey corresponds to the old EUdecree. Basically there is a trend towards the accounting of real costs.

Also in the expert interviews it turned out that the agreements are rather unremarkable ones. Due to the consideration of feedbacks and comments by the liaison agencies as well as regular exchange, practical considerations are incorporated in the legal regulations of the agreement. Due to globalisation, there are enormous increases in transnational insurance courses that are difficult to handle without electronic data exchange. In Austria, the electronic exchange with Turkey is envisaged for 2015. In principle there is also need for general modernisation and actualisation of the bilateral agreements, e.g. related to agreements on cost reimbursements, etc. From the German point of view, some minor proposals for improvement (e.g. related to contribution refunding, voluntary insurance) exist. However, for reason of details, the agreement will not be changed, as the efforts for a ratification of the new amendment in both countries would be too high.

Publication and presentation	<ul> <li>Fuchs M. (2014) 'Jenseits des Gastarbeiterabkommens – Portabilität von Pensionen und Krankenversicherung für Pensionisten zwischen Österreich und der Türkei', <i>Soziale Sicherheit</i> 6: 288-295.</li> <li>Fuchs M. / Winkelmann J. (2014) 'Beyond the "Guest Worker" Agreement – Portability of Pensions and Health Insurance for Pensioners between Germany and Turkey, Presentation at the FISS Conference 2014, 2-4 June, Sigtuna; <u>http://www.euro.centre.org/data/1403515974_7935.pdf</u></li> <li>Holzmann R., Fuchs M., Elitok S.E., Dale P. (forthcoming) 'Assessing Benefit Portability for Migrant Workers: Lessons Learned from a Review of the Germany-Turkey Bilateral Social Security Agreement', <i>Social Protection &amp; Labor Global Practice</i>. Washington, DC: The World Bank.</li> <li>Holzmann R., Fuchs M., Elitok S.E., Dale P. (forthcoming) 'Assessing Benefit Portability for Migrant Workers: Lessons Learned from a Review of the Austria- Turkey Bilateral Social Security Agreement', <i>Social Protection &amp; Labor Global Practice</i>. Washington, DC: The World Bank.</li> <li>Holzmann R., Fuchs M., Elitok S.E., Dale P. (forthcoming) 'Assessing Benefit Portability for Migrant Workers: Lessons Learned from a Review of the Austria- Turkey Bilateral Social Security Agreement, <i>Social Protection &amp; Labor Global</i> <i>Practice</i>. Washington, DC: The World Bank</li> </ul>
Head of Project	Practice. Washington, DC: The World Bank. Michael Fuchs
Project Team	Michael Fuchs, Bernd Marin, Juliane Winkelmann
Financed by	The World Bank

## **Social Situation Monitor**

4/2013 - 3/2016

Contact	Orsolya Lelkes (lelkes@euro.centre.org)
Aims	Ensuring continuity of the European Observatory on Demography and the Social Situation, this project aims at providing policy-relevant analytical and methodological support on the developments in income distribution, poverty, social exclusion and material deprivation as well as health, helping the Commission in its efforts to monitor living standards and life chances across the EU and across different groups in society, and to evaluate how policies affect them.
	We analyse issues related to living conditions and their various determinants and aspects such as income, wealth, poverty, taxes and benefits, consumption, access to health, long-term care and other services, time use, social mobility, social inclusion and social participation. The project helps identify socio- economic groups (such as the elderly, families with children, youth, ethnic minorities, migrants etc.) which may be at a particular disadvantage and would need to be targeted by policies.
Findings	The results of the analysis are published in a series of Research Notes on specific issues of policy relevance each year and in an on-line resource on the European Commission website.
	The on-line database includes comparative analyses across the EU of income inequality, the risk of poverty, material deprivation, the distribution of wealth, and non-monetary aspects of well-being. It is based to a large extent on the EU-SILC (Statistics on Income and Living Conditions) and they extend the periodic studies produced by Eurostat. Other data sources include: European Labour Force Survey; Survey on Health, Ageing and Retirement in Europe (SHARE); European Household Budget Survey (EHBS); Adult Education Survey; PISA – survey of the academic performance of young people.
	In 2014, the European Centre team composed of Katrin Gasior and Orsolya Lelkes carried out analysis on the risk of poverty across Europe.
Research Notes	<ul> <li>2014</li> <li>Analysing equity in the use of long-term care in Europe – Research Note 9/2014 by Ricardo Rodrigues, Stefania Ilinca, Andrea Schmidt</li> <li>The effect of the crisis on young people's ability to live independently – Research Note 5/2014 by Erhan Özdemir, Terry Ward and Eszter Zólyomi</li> </ul>

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	<ul> <li>2013</li> <li>The indirect costs of long-term care – Research Note 8/2013 by Ricardo Rodrigues, Katharine Schulmann, Andrea Schmidt, Niki Kalavrezou and Manos Matsaganis</li> <li>The impact of the financial crisis on unmet needs for healthcare – Research Note 7/2013 by Ricardo Rodrigues, Eszter Zólyomi, Niki Kalavrezou and Manos Matsaganis</li> </ul>
Website	http://ec.europa.eu/social/main.jsp?catId=1049&langId=en
External Project Coordinator	Terry Ward, Applica
External Project Collaborators	<ul> <li>Holly Sutherland, ISER, UK</li> <li>István György Tóth, TARKI, Hungary</li> <li>Manos Matsaganis, Athens University of Economics and Business, Greece</li> <li>Eva Sierminska, CEPS/INSTEAD, Luxembourg</li> </ul>
Project Team EC	Orsolya Lelkes (Team Leader), Katrin Gasior, Ricardo Rodrigues, Andrea E. Schmidt, Katharine Schulmann, Eszter Zólyomi
Financed by	European Commission, DG Employment, Social Affairs and Inclusion

#### Mobilising the Potential of Active Ageing in Europe (MOPACT)

Aiming to provide the research and practical evidence upon which Europe can make longevity an asset for social and economic development

3/2013 - 2/2017

Contact Orsolya Lelkes (lelkes@euro.centre.org)

Aims

MOPACT aims to provide the research and practical evidence upon which Europe can begin to make longevity an asset for social and economic development. To achieve this aim MOPACT concentrates the highest possible quality of scientific analyses into the development of innovative policies and approaches that can assist public authorities and other key actors, at all levels in Europe. MOPACT starts from the conviction that Europe requires a new paradigm of ageing if it is to respond successfully to the challenges of demographic change.

Ageing is currently understood as a time of decline, frailty and dependence and policy responses to it still reflect the historical era when retirement took place for a majority at state pension ages and post-retirement years were relatively short. Changes in the labour market and social behaviour coupled with a remarkable extension in longevity have transformed the experience of later life. The boundaries of frailty are being pushed back and, for a growing number of older Europeans, 70 is the new 50.

A multi-disciplinary team will target the key challenges of ageing:

- · The continuing longevity revolution
- · A shrinking and ageing labour force
- · The fiscal sustainability of pensions, welfare systems and health care
- The structural lag between changes in society and subsequent changes in societal institutions and attitudes
- The rising need for long-term care
- Changing social and political roles

#### The European

**Centre's Tasks** 

The European Centre is a Work Package (WP) leader in WP8 (Social Support and Long-term Care) and participates in WP1 (Realising Active Ageing), WP3 (Extending Working Lives), and WP5 (Health and Well-being).

Kai Leichsenring is leading WP8 on Social Support and Long-term Care with the aim to identify drivers and obstacles to social innovation. Strategies to extend healthy life expectancy and quality of life need to address all people as they age including those who are frail, disabled and in need of care. Active Ageing in the context of LTC is, perhaps more than in other areas, dependent on social investment strategies across a range of policy fields. For instance, there are ample margins for organisational improvements in terms of coordination with health systems, for promoting 'carer-friendly' employment policies and for designing user-friendly ICT applications to enable social participation and solidarity in the community.

WP3 (Extending Working Lives) aims to identify innovative, effective, sustainable and transferable private and public-sector strategies that encourage and enable older workers (a) to stay longer in employment and (b) to intensify lifelong (vocational) learning in the later stages of their working lives. The WP draws on international best practice to integrate measures for extending working lives that enhance quality of work and well-being of workers involved.

WP5 aims to identify the pathways that increase healthy life years of older people by exploring the relationship between good health and social participation. The team at the European Centre focuses on social participation in the form of informal care provision, its main determinants and how they vary with the health status of caregivers.WP5 analyses participation in two different types of informal care provision using data from the Survey on Health, Ageing and Retirement in Europe (for 10 European countries): care to older adults (both inside and outside the household) and grand-parenting.

Publications	•	WP 3: WP 5: WP 8:	"Extending Working Lives: Conceptual Framework" "Trends in Healthy Life Expectancy and Health Indicators Among Older People in 27 EU Countries" "Social Support and Long-term Care in EU Care Regimes"
Website		<u>http://mo</u>	pact.group.shef.ac.uk/
External Project Coordinator		Alan Wall	ker, University of Sheffield
Project Team EC			asior, Stefania Ilinca, Kai Leichsenring, Orsolya Lelkes, Bernd Marin, Rodrigues, Andrea E. Schmidt, Katharine Schulmann, Eszter Zólyomi
Project Partners		University of Sheffield (UK) (coordinator), CEPS (Belgium), Stichting Katholieke Universiteit Brabant Universiteit van Tilburg (Netherlands), Ministry of Economic Affairs, Agriculture and Innovation (Netherlands), CCA (Italy), ETLA (Finland), University of Kent (UK), CASE (Poland), NIESR (UK), INCRA (Italy), Kopint-Tarki (Hungary), Age Platform Europe AISBL (Brussels), ICS-UL (Portugal), UNINA (Italy), RUB (Germany), UWUERZ (Germany), University of Oslo (Norway), Cranfield University (UK), UNISA (Italy), MTA TK (Hungary), IAT (Germany), Stichtung VU-VUMC (Netherlands), University of Innsbruck (Austria), University of Technology Braunschweig (Germany), University of Southampton (UK), TUD/IFG (Germany), PRAXIS (Estonia), INCSMPS (Romania)	
Financed by		•	Commission, Seventh Framework Programme and the TOP.EU ne of the Austrian Federal Ministry of Science and Research

## Neuordnung der bedarfsorientierten Sozialtransfers und aktivierende Interventionsformen in Südtirol

Rearrangement of demand-oriented social transfers and activating interventions in South Tyrol

2013 - 2015

ContactMichael Fuchs (fuchs@euro.centre.org)AimsThe project phase "analysis of trends in the area of basic income security in<br/>Europe" should provide additional input for a proposal on the rearrangement<br/>of demand-oriented monetary transfers in South Tyrol. Up-to-date, a<br/>standardisation of basic income models in the EU-28 was hardly reached.<br/>Although there are overlaps in some countries (e.g. most basic income benefits<br/>are linked with activation measures), significant differences can be observed.ResultsThe European Centre analysed minimum income regulations in selected<br/>European countries.

*Pieter Vanhuysse* offered an empirical comparative overview of recent experience in Western Europe regarding minimum income benefit policies – in 16 countries of most immediate comparative interest for South Tyrol: the original EU-15 Member States plus Switzerland. He analysed minimum income benefit data separately for three sociological beneficiary type cases – *single persons, lone parents with two children, and two-parent families with two children.* 

Michael Fuchs analysed analysed the following reforms in more detail: Austria, where the new minimum income benefit ("Bedarfsorientierte Mindestsicherung") replaced the former social assistance in 2010/11; and Germany, where unemployment assistance and social assistance were merged into the new benefit 'Unemployment Benefit II' ("Hartz IV-Reform") in 2005.

In Austria, the new minimum income benefit represents an important step towards combating poverty as it introduced a relatively uniform minimum standard in all federal states, speeded up the administrative process and reduced regress options related to relatives and the obligation to pay back benefits received once an employment is taken up. However, the federal states still have large room for manoeuvre, e.g. related to housing allowances. Furthermore, the new benefit aims for a more intensive activation towards the labour market. However, the question remains whether an improvement of the individual employability is of use given that many clients are not placeable in the labour market due to lacking demand. On the administrative side, the increase of clients in working age who receive both unemployment benefits and minimum income benefit leads to double responsibilities in times of scarce resources. The minimum income benefit and accompanying measures are still far away from the guiding principle of assistance by one source. In Germany, long-term unemployment was not effectively combated by the new merged Unemployment Benefit II (social assistance type). Evidence suggests that measures to stimulate the labour market and to coach and place clients were more important for their labour market integration than the concrete design of the benefit. In addition, positive outcomes of Unemployment Benefit II result more from a deterrence effect than from a supportive effect. Correspondingly, especially shortly before the expiration of Unemployment Benefit I (unemployment insurance type) the activities to look for a job strongly increased. Hand in hand with the change to the new benefit also a prior-ranked orientation towards a rapid but often unsustainable reduction of the need for support occurred. The activition limits were also observable: due to labour market reasons an integration in an unsupported occupation hardly took place, especially for unemployed persons difficult to place and with multiple problems.

The final conference of the project was held in Bozen in December 2014 and the final report was completed in January 2015.

Project Team Michael Fuchs, Bernd Marin, Pieter Vanhuysse

Financed by European Social Fund

## Families in the Economic Crisis

2014 - 2015

Contact	Katrin Gasior (gasior@euro.centre.org)
Aims	Together with its partner from the Austrian Institue for Family Studies at the University of Vienna and individual family policy experts such as Mary Daly (University of Oxford) and Tatiana Rakar (Slovenian Social Protection Institute), the European Centre has won a bid for research funding from the European Foundation for the Improvement of Living and Working Conditions, for a project entitled 'Families in the Economic Crisis: Mapping Policy Responses in 10 European Member States'.The Centre took charge of tasks 3 and 8 within this project and was involved in two Expert Workshops organised by Eurofound.
	Task 3 involved the use of EU-SILC survey data to provide evidence for each of the countries studied, specifically to identify household types including lone parents, couple families and extended families, and to explore various working patterns and work arrangements of the parents.
	Task 8 synthesized the main lessons learnt from all country case studies in the project. Bearing in mind the different institutional and socio-political settings across the major models of welfare in Europe, it will also derive larger conclusions for family policy design and family welfare during and after crisis periods.
External	
Head of Project	Sonja Blum, Austrian Institute for Family Studies
Project Team EC	Katrin Gasior
Financed by	European Foundation for the Improvement of Living and Working Conditions

# Promotion of Older Workers' Employability and Postponed Retirement

2014 - 2015

Contact	Eszter Zólyomi (zolyomi@euro.centre.org)
Aims	<ul> <li>The European Centre participated in the project "Promotion of Older Workers' Employability and Postponed Retirement". The project team at the European Centre was responsible for conducting a study on good practices from Austria, Finland and the Netherlands with suggested measures for Slovenia, focusing on:</li> <li>Incentives for older workers to continue working and for employers to employ older workers.</li> <li>Removing obstacles to the hiring and retention of older workers.</li> <li>Improving the employability of older workers.</li> </ul>
	Results of the study were presented at the Third Active and Healthy Ageing in Slovenia (AHA.SI) Conference titled "Ageing Population – How to Choose Effective Measures?" on 17-18 June in Ljubljana.
	The project was carried out with the support of and in cooperation with the Institute for Economic Research, Slovenia.
Project Team EC	Michael Fuchs, Katrin Gasior, Bernd Marin, Pieter Vanhuysse, Eszter Zólyomi
Project Partner	Institute for Economic Research, Slovenia
Financed by	Institute for Economic Research, Slovenia

Research Programme "Health and Care"

### Addictions and Lifestyle in Contemporary Europe – Reframing Addictions Project (ALICE RAP)

4/2011 - 3/2016

Official ALICE RAP Website (http://alicerap.eu) Website Irmgard Eisenbach-Stangl (eisenbach-stangl@euro.centre.org) Contact ALICE RAP is a five-year Europe-wide project consisting of a large number of Aims researchers and research institutions from 25 European countries that endeavour to analyse the place and challenges of addictions and lifestyles with regard to the cohesion, organization and functioning of contemporary European society. The scope of addictions is substances and gambling. The work is organised in seven Working Areas, each split into work packages. The project started on I May 2011 with a first meeting of partners that same month. The main aim of the first meeting was to integrate the numerous topics and research projects, and to start discussion and work in the working areas and work packages. The European Centre is mostly involved in Working Area I "Ownership of Addiction" and contributes to its work package I "Addiction through Ages" and work package 2 "Stakeholder Analysis". Within Work Package 1, concepts surrounding substance use have been compared during 3 key periods; 1860-1930, 1950s-1960s and 1970s-1980s. Concepts play a central part in the formulation of problems and solutions to the use of substances. The countries involved in the comparison were Austria, Italy, Poland and the United Kingdom. The cross-European historical study was carried out with a common methology and brought substances together: it considered what now is called illicit drugs, alcohol and tobacco, It examined how conceptual boundaries between substances and the terms used to describe them have been erected, maintained and modified over time. Also Work Package 2 aimed to advance understanding of the processes and factors contributing to shifts in policy responses to the use of addictive substances, in particular of the roles of selected stakeholder groups in relation to alcohol and drug policy. A series of case-studies was the approach chosen to achieving the aims and objectives of this cross-national comparative research. The countried involved were Austria, Denmark, Finland, Italy, Poland and the Untied Kingdom. **External Project Author** and Head of Project Peter Anderson, Newcastle University **External Project** Coordinator Antoni Gual, Fundació Clínic per a la Recerca Biomèdica, Barcelona Irmgard Eisenbach-Stangl, Ricardo Rodrigues **Project Team EC** European Commission, Seventh Framework Programme, and the TOP.EU Financed by programme of the Austrian Federal Ministry of Science, Research and Economy

## AGORA – Wie lässt sich die Öffentlichkeit für Jugendliche und Erwachsene gesundheitsfördernd gestalten?

AGORA - How to Build a Health-promoting Public Sphere?

5/2012 - 5/2015

Aims

 Website
 AGORA Project Site (http://www.euro.centre.org/agora/ – in German)

 Contact
 Irmgard Eisenbach-Stangl (eisenbach-stangl@euro.centre.org)

The project is the successor to a study on "Juvenile Alcohol Scenes" carried out by the European Centre in collaboration with the Universities for Applied Sciences of Vienna and St. Pölten some years ago. It aims to put policy-relevant results of the first study into practice and to contribute to the establishment of sustainable structures of collaboration between stakeholders shaping the public sphere, i.e. mainly the police and mobile social services but also the gastronomy and the media. The focus of interest is to enhance collaboration among the selected stakeholders with regard to the consumption of illegal and legal psychoactive drugs including tobacco and its consequences. The geo-political unit of the intended change is the district. Attention is paid to different sociopolitical contexts: the project is carried out in Austria's only metropolitan area Vienna and in the rural provincial state surrounding it, i.e. in Lower Austria.

To achieve these aims, a mix of methods is used, among them participant observations of relevant activities of selected stakeholders in the public sphere; qualitative interviews and group discussions with selected representatives of stakeholders; content analysis of observation and interview protocols; content analysis of relevant articles published in selected local and national media; literature review and reviews of related practice projects; working groups of stakeholders on local and state level. The public conference organised after the first year attracted a lot of interest and proved to be a success. And also the occasional seminars of the European Centre accompanying the study attracted many visitors and contributed to a lively discussion.

The project proved to be successful in the rural provincial areas where collaboration between the police and social work had hardly been developed. It failed in Vienna, where police and social work were linked by several mostly voluntary and informal networks, though it was recognized that sustainable structures on district level would be of importance. Gastronomy in all districts defended itself against any collaboration with the above-mentioned stakeholders – fearing that profit interests could suffer. The interests of the media were mixed and most positive on the district level. A report on the findings will be published at the end of 2015 and in spring 2016 the findings will be presented to the public in the framework of a conference.

#### **Occasional Seminars**

series

The Occasional Seminars series accompanying the project AGORA was launched during the project period to take up issues that arose as the project progressed. The lecture series was an opportunity to reflect on these issues and to make the project AGORA known in relevant academic and practical areas and to enable networking. A total of 7 seminars have been organized:

- Wolfgang Dür: Change if you can. Multiprofessionelle Praxis und intersektorale Politik in der Gesundheitsförderung [Change – if you can. Multiprofessional practise and intersectoral politics of health promotion], 19 December 2013
- *Christoph Stoik*: Wandel der Definitionen, Nutzungen und Kontrollen [Change of definitions, utilization and control], 9 January 2014
- Kai Leichsenring: Intersektorale Politik und ihre Folgen f
  ür Individuum und Gesellschaft [Individual and societal consequences of intersectoral politics], 30 April 2014
- Wilfried Datler: Zusammenarbeit von Organisationen. Über Emotionen und deren Bedeutung für die Entwicklung aufgabenorientierter Kooperation [Cooperation of organizations. The relevance of emotions for the development of taskoriented cooperation], 10 September 2014
- Gerhard Strohmeier: Öffentlichkeit im Dorf? [Public space in villages?], 29 October 2014
- Peter Nowak: Health in All Policies. Warum intersektorale Zusammenarbeit entscheidend ist f
  ür die Gesundheit der Bev
  ölkerung [Health in All Policies. The importance of intersectoral cooperation for a healthy population], 3 December 2014
- Anna Schachner & Michael Stadler-Vida: Evaluation in Projekten der Gesundheitsförderung – ein Balanceakt? [Evaluating health promotion projects – a balancing act?], 18 June 2015

Head of Project	Irmgard Eisenbach-Stangl
Project Team EC	Irmgard Eisenbach-Stangl, Katrin Gasior, Judith Schreiber
Project Partners	<ul> <li>Kurt Fellöcker (Univ. for Applied Sciences St. Pölten, Study Prog. Social Work)</li> <li>Judith Haberhauer (Univ. for Applied Sciences Vienna, Study Prog. Social Work)</li> </ul>
Financed by	<ul> <li>Austrian Health Promotion Fund (FGÖ)</li> <li>Viennese Institute for Health Promotion (WIG)</li> <li>Lower Austrian Health and Welfare Fund (NÖGUS)</li> </ul>

## Pflegebedarf und Versorgungsmix in Wien

Demand for Long-Term Care and Supply-Mix in Vienna

2012 - 2014

Contact	Andrea E. Schmidt (schmidt@euro.centre.org) and Michael Fuchs (fuchs@euro.centre.org)
Aims	The project aimed to identify patterns of use of care in Vienna based on a series of different assumptions on future developments in the long-term care sector. The study builds primarily on several sources of administrative data that were linked for the first time. Data for the years 2011 and 2012 include information about the type and hours of care used, health status (e.g. level of care need), socio-demographic information (e.g. age, gender), information about socio-economic status (e.g. personal income, district of residence), and contextual factors (e.g. household size, informal carers).
	Using bivariate and multivariate methods, the study sought to provide a comprehensive picture of those determinants that significantly contribute to older people's decisions to opt for certain services in five different settings. The second part of the study built on the findings from the data analysis to suggest scenarios of long-term care developments in Vienna until 2030 grounded in evidence-based assumptions involving socio-demographic characteristics, care needs and contextual factors.
Results	The analysis shows that, overall, little more than half of all people in need of care in the dataset use care and support services of some kind – whether in the form of home care and day-care services (25%), in residential care places (16%), in subsidized housing units with or without care (9%), or by means of subsidised 24-hour care (2%). At the same time, however, this also means that almost every second person with long-term care needs in Vienna receives only a care allowance without making use of professional long-term care or support services.
	The determinants of utilization vary greatly depending on the support setting. For example, women are more likely to be found in nursing homes or other residential facilities, or in 24-hour care, while men more often receive home care and day-care services, or a care allowance only – and therefore more informal care. The differences may be explained primarily by the fact that women live alone more often due to their higher life expectancy and because male caregivers tend to delegate care tasks more often than female primary caregivers.
	The employment status of the primary caregiver influences individual choices of support settings also: in cases in which people receive 24-hour care, the main caregiver tends to work full-time, pointing to the well-known challenge of reconciling work and caring tasks. Among persons who do not receive long- term care and support services, however, the primary caregiver is less likely to be gainfully employed, or to work part-time. Beyond employment, income also plays a role in the type of support that is chosen. In fact, people with higher income are more likely to use 24-hour care, home care or day-care services.

People with higher incomes also tend to have better housing conditions, and the larger living space available to them also favours the employment and accommodation of 24-hour live-in carers.

A key determinant for receiving a care allowance only without additional longterm care or support services is the fact that men often live together with their – mostly unemployed – partner. The partner thus usually becomes the primary informal caregiver for his/her partner/spouse. The presence of a partner plays also a crucial role in the take-up of home care or day-care services.

A number of social developments including the increase in female employment rates and women's retirement age, a rise in divorce rates and single households, and decreasing age differences between partners, could in the future lead to a decrease in the availability of partners and spouses serving as primary caregivers for older dependent people. For demographic reasons, informal care tasks will also be shared among ever fewer children. Therefore, it is highly likely that an increased need for social services in long-term care will arise in Vienna in the coming decades.

Based on these results, five different scenarios of projections of expenditure on long-term care and support services for the years 2025 and 2030 were developed. In addition to demographic developments and associated improvements or deteriorations in health status, other developments, such as an assumed decline in informal care and various policy scenarios, were also considered. Although an increase in expenditure seems to be inevitable, it could be deduced that cost containment is a possibility. Changes in entitlement conditions, for instance in the case of subsidised housing units, may help to improve the targeting of resources to higher levels of care. Also, the expansion of home care services is expected to reduce demand for residential slots, though this is also associated with a significant increase in the number of service hours per client. Likewise, a discontinuation of 24-hour care would involve significant cost increases, while preventive measures of remobilisation and rehabilitation could lead to substantial cost reductions.

Finally, it should be emphasised that a focus on costs alone is not sufficient to capture the complex dynamics of the long-term care system as a whole. On the positive side, this complexity offers a number of possibilities to promote or prevent the development of certain situations. One of the aims of this study has been to highlight such interventions and to help prepare an appropriate strategy for social care planning for older people in Vienna.

Head of Project	Andrea E. Schmidt
Project Team	Michael Fuchs, Maria M. Hofmarcher, Kai Leichsenring, Andrea E. Schmidt
Financed by	City of Vienna, MA 24

## Social Situation Monitor – Research Notes on Access to Long-Term Care Services and the Health Status of Older European Workers

2014 - 2015

<u>Ricardo Rodrigues</u> (rodrigues@euro.centre.org)

Aims

Contact

The Social Situation Monitor carries out policy-relevant analyses and research on the current socio-economic situation in the EU and examines the major emerging issues with the aim of providing the necessary evidence on which to base policy-making in the European context.

With regard to the challenge of population ageing in Europe, the European Centre team contributed research on the demand for long-term care services, which is likely to increase in the next decades. Unlike healthcare, very little is known about differences in access to healthcare services between groups of dissimilar socio-economic background and how these differences vary between countries. In a Research Note using quantitative methods and a comparative, international dataset, we analysed possible inequality and inequity in the use of long-term care in Europe. Inequality in access to long-term care services is a subject that is likely to have an impact well beyond the people in need of care, given that informal care is often provided by women of working age as a replacement for non-existing or inaccessible services.

In a second Research Note analysing the employment situation of older workers in the EU and the different strategies countries have adopted to encourage and enable older workers to stay longer in employment, we will contribute research on the potential impact of health (particularly mental health) on the employability of older workers and on early retirement. The aim of our contribution is to use internationally comparable data (SHARE and EU-SILC surveys) to compare the health conditions of older workers in different EU countries, particularly in terms of the aspects most likely to affect their employment status, such as the extent to which they are affected by disability, chronic conditions, mental health and depression, and work-related injuries and diseases. The Research Note will be published in the last quarter of 2015.

PublicationAnalyzing Equity in the Use of Long-term Care in Europe, Ricardo Rodrigues, StefaniaIlinca and Andrea E. Schmidt, Reseach Note 9/2014, published March 2015

Head of Project Ricardo Rodrigues

Project Team EC Stefania Ilinca, Ricardo Rodrigues, Andrea E. Schmidt, Katharine Schulmann

**Project Partners** • Applica (Belgium)

• Tarki Social Research Institute (Hungary)

- ISER at the University of Essex (UK)
- Athens University of Economics and Business (Greece)

HEALTH AND CARE

#### Mobilising the Potential of Active Ageing in Europe (MOPACT)

2013 - 2017

 

 Website
 MOPACT Website (http://mopact.group.shef.ac.uk/)

 Contact
 Kai Leichsenring (leichsenring@euro.centre.org), WP8 Andrea Schmidt (schmidt@euro.centre.org), WP5

 Aims
 The starting point for MOPACT are the ambitious goals set by Horizon 2020 and the European Innovation Partnership Pilot Project on Active and Healthy Ageing (EIPAHA). Our response is ambitious, too: we aim to provide the research and practical evidence upon which Europe can make longevity an asset for social and economic development.

> MOPACT creates a high-quality, multi-disciplinary critical mass of leading researchers and, in the closest possible partnership with stakeholders and through a carefully planned iterative process, builds a compendium of essential state-of-the-art and foresight intelligence upon which to develop the policy, practice, service and product developments and innovations required to meet the goals of Horizon 2020 and, in particular, the EIPAHA. Active and healthy ageing is the primary focus of MOPACT and it builds on the momentum created by the EY2012.

The European Centre team participates in (Work Package) WPI (Realising Active Ageing), WP3 (Extending Working Lives), WP5 (Health and Well-being) and WP8 (Social Support and Long-term Care).

Kai Leichsenring is leading WP8 on Social Support and Long-term Care with the aim to identify drivers and obstacles to social innovation in an area of the Active Ageing concept that is often neglected. Indeed, strategies to extend healthy life expectancy and quality of life need to address all people as they age including those who are frail, disabled and in need of care. Active Ageing in the context of LTC is, perhaps more than in other areas, dependent on social investment strategies across a range of policy fields. For instance, there are ample margins for organisational improvements in terms of coordination with health systems, for promoting 'carer-friendly' employment policies and for designing user-friendly ICT applications to enable social participation and solidarity in the community.

WP5 aims to identify the pathways that increase healthy life years of older people by exploring the relationship between good health and social participation. The team at the European Centre focuses on social participation in the form of informal care provision, its main determinants and how they vary with the health status of caregivers (i.e. morbidity status). WP5 analyses participation in informal care provision using data from the Survey on Health, Ageing and Retirement in Europe (for 10 European countries), considering both extra-residential 'informal care' activities provided on a regular basis to frail, ill or disabled family members, friends or neighbours, and non-custodial care for grandchildren ('grandparenting').

Publications	<ul> <li>WP3 "Extending Working Lives": Conceptual Framework</li> <li>WP5 "Review of Healthy Life Expectancy across Europe"</li> <li>WP5 "Morbidity Effects on Informal Caregiving: Comparing Patterns of Care Provision of Older People in Poor and Good Health in Europe" forthcoming in the European Journal of Ageing</li> <li>WP 8 "Social Support and Long-term Care in EU Care Regimes – Framework Conditions and Initiatives of Social Innovation in an Active Ageing Perspective"</li> <li>WP8 "Informal vs. Formal Care: Economic Incentives and Fiscal Implications"</li> <li>WP8 "A Qualitative Study of the Key Drivers and Barriers to Social Innovation in Long-term Care in Selected EU Countries"</li> </ul>
External	
Head of Project	Alan Walker, University of Sheffield
	<ul> <li>CEPS (Belgium)</li> <li>Stichting Katholieke Universiteit Brabant, Universiteit van Tilburg (Netherlands)</li> <li>Ministry of Economic Affairs, Agriculture and Innovation (Netherlands)</li> <li>CCA (Italy)</li> <li>ETLA (Finland)</li> <li>University of Kent (UK)</li> <li>CASE (Poland)</li> <li>NIESR (UK)</li> <li>INCRA (Italy)</li> <li>Kopint-Tarki (Hungary)</li> <li>Age Platform Europe AISBL (Brussels)</li> <li>ICS-UL (Portugal)</li> <li>UNINA (Italy)</li> <li>RUB (Germany)</li> <li>UWUERZ (Germany)</li> <li>University of Oslo (Norway)</li> <li>Cranfield University (UK)</li> <li>UNISA (Italy)</li> <li>MTA TK (Hungary)</li> <li>Stichtung VU-VUMC (Netherlands)</li> </ul>
	University of Innsbruck (Austria)
	University of Technology Braunschweig (Germany)
	<ul> <li>University of Southampton (UK)</li> <li>TUD/IFG (Germany)</li> </ul>
	PRAXIS (Estonia)
	• INCSMPS (Romania)
Project Team EC	Katrin Gasior, Stefania Ilinca, Kai Leichsenring, Orsolya Lelkes, Bernd Marin, Bicardo Bodriguos Andrea E Schmidt, Katharina Schulmann, Erzter Zélvemi

Financed byEuropean Commission, Seventh Framework Programme, and the TOP.EU

#### Long-term Care Markets and Integrated Care – Policy Utopia or a Goal within Reach?

2014 - 2015

**Contact** <u>Ricardo Rodrigues</u> (rodrigues@euro.centre.org)

Aims

One concern arising from the market developments introduced in long-term care is that competition may have contributed to an increased fragmentation of care provision and that users – many of whom in vulnerable situations – now have to navigate a more complex system of providers to address their needs that require both healthcare and long-term care. In other words, the question is how increasingly fragmented provider markets that underline choice and competition are compatible with the policy goal of integrating health and longterm care to bring about improvements in the outcome for users.

The research focused on older people with long-term care needs and the integration of healthcare (e.g. acute, primary care) and long-term care (e.g. home care, residential care). It aimed to explore to what extent the integration of care has been achieved in a context of competition and choice by using a comparative research approach that analysed differences within and between countries.

For this purpose, field research was undertaken in the municipality of Norrtälje (Stockholm County) in Sweden as well as in the municipalities of Dortmund and Leipzig in Germany. Germany was chosen as a comparator for Sweden because its long-term care system is arguably among the most market-oriented ones in Europe, and because of having a diverse provider market, relatively low barriers to entry, and a high level of user choice.

Fieldwork for this project (including a web-based survey of professionals and semi-structured interviews) took place between October 2014 and April 2015. The final report 'Integrated Care, Choice and Competition - Challenges and Strategies of Care Coordination in the Context of Market-Oriented Governance in Germany and Sweden' was presented to the Ministry of Health and Social Affairs in June 2015. The findings of this qualitative study showed a nuanced picture as to the conciliation of choice and competition, on the one hand, and integrated care, on the other hand. The overall opinion of those interviewed in the three sites was that it was possible to achieve integrated care in a context of user choice and competition. For many of the different stakeholders interviewed - particularly in Germany - user choice had been internalised as a de facto right of users. Integrated care initiatives in the German sites are thus forced to work in a context of choice and competition, in some cases they even were a reaction to this basic framework condition, while in the Swedish site, competition became a new challenge for an already established integrated care model.

A workshop to discuss the results with stakeholders from the three participating municipalities is planned for Autumn 2015.

Head of Project	Ricardo Rodrigues
Project Team	Kai Leichsenring, Ricardo Rodrigues, Juliane Winkelmann, Rebecka Falk (external)
Financed by	Swedish Ministry of Health and Social Affairs

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## INNOVAGE – Social Innovations Promoting Active and Healthy Ageing ICT-based Social Support for Carers of Older People

2014 - 2015

Website		INNOVAGE Project Site (http://www.innovage.group.shef.ac.uk/)
Contact		Juliane Winkelmann@euro.centre.org)
Aims		The objectives of the INNOVAGE project directly address the current major barriers to innovation and to the achievement of the extension of healthy life years across the EU. The project aims to achieve impact in the public, private and third sectors and is built on the closest possible partnership with end-users and stakeholders, including older people themselves. The INNOVAGE project is dedicated to developing, testing as well as surveying and cataloguing social innovations that will have a solid impact on improving the quality of life and well-being of older people. Four new innovations will be developed and tested:
	ii) iii)	social innovations for user-driven housing of older people; a web-platform for informal carers of older people; social intervention for improving obesity in old age, and social innovation for activation of people with dementia living in long-term care institutions.
		The European Centre is involved in INNOVAGE WP3 by developing the Austrian national page of a multi-lingual web platform addressing informal carers' needs, which will be implemented in all 28 EU Member States with both common contents and national-specific ones. The platform includes not only contents related to caregiving activities and coping strategies, but also interactive tools allowing informal carers and other target groups (i.e. care professionals and employers of working carers) to communicate, share their experiences and support each other. The national pages will be presented to a group of informal carers in each country before being released in 2015.
Project Team EC		Ricardo Rodrigues, Juliane Winkelmann
Project Partners	• • • • • • • • • • • • • • • • • • • •	University of Sheffield (UK) (coordinator) Lunds Universititet (Sweden) Ruprecht-Karls Universität Heidelberg (Germany) Newcastle University (UK) INRCA (Italy) AGE Platform Europe (Belgium) Eurocarers (Luxembourg) Sheffield Hallam University (UK) Latvian Council of Science (Latvia)
Financed by		European Commission, Seventh Framework Programme

# Serbian Project SAVE - Social Protection Assessment for Values and Effectiveness

2014 - 2016

**Contact** <u>Stefania llinca</u> (ilinca@euro.centre.org)

Aims

Together with its partners from Serbia, the European Centre has won European funding from DG Employment under the PROGRESS framework for the research project SAVE – Social Protection Assessment for Values and Effectiveness. This is the first project in the Serbian framework of PROGRESS that deals with the cost-effectiveness and cost-efficieny of the social welfare system, specifically deinstitutionalization (DI) of welfare services.

SAVE is generating evidence to help steer national reform in the deinstitutionalization, through economic analysis of deinstitutionalization as well as analysis of the Serbian deinstitutionalization policies and processes. Access to EU and regional good practices and lessons learnt was provided through European Centre policy advice in the form of an extensive comparative policy report drawing on four characteristic case-studies from Western and Eastern Europe. The report includes policy advice and transferable practices suggestions in order to help guide the policy development process in the Serbian long-term care system.

The European Centre also organized a two-day study tour and workshop in Austria for 20 Serbian social welfare professionals and researchers. Participants were introduced to the Austrian long-term care system, to examples of good practices aimed at developing long-term care systems (both through expert presentations and on-site study visits) and discussed the potential for transferability and mutual learning. A Round Table with Serbian regional experts and a final conference in autumn 2015 will help to further refine and disseminate the results.

The recommendations and findings from these activities, including national background research in Serbia, will be fed into the policy-making and legislative processes, and support further legislative developments in the area of cost-effectiveness in Serbian social welfare.

External	
Head of Project	Slavica Milojevic, Head of Department, Serbian Research Institute of Social Policy
Head of Project EC	Stefania Ilinca
Project Team EC	Stefania Ilinca, Kai Leichsenring, Ricardo Rodrigues, Eszter Zólyomi
Financed by	European Commission, PROGRESS Programme

### "Gute Pflege" aus Sicht der Beschäftigten

"Good Care" from the Care Workers' Perspectives

2014 - 2015

Kai Leichsenring (leichsenring@euro.centre.org) Contact This study aimed to provide a repository of themes and key aspects that Aims constitute "Good Care" from the perspective of the different categories of employees in long-term care as well as recommendations to improve structural, process- and results-oriented improvements in the Austrian long-term care system. Twelve exploratory interviews with representatives of the different professional groups, 4 interviews with live-in migrant carers and a series of 5 workshops with mixed groups of 6-10 representatives of professionals working in residential and community care were carried out between December 2014 and May 2015. As a result, the final report contains a literature review, a catalogue titled "Good Care from A to Z" and policy recommendations for different stakeholders at societal, organisational and individual level. Furthermore, a workshop with family carers was organised to contrast their perspectives with those of the professionals, showing the acknowledgement of care professionals' efforts that, however, do not always comply with carers' expectations. The study generated evidence on links between the educational system, working conditions and other framework conditions, and the quality of help and care. The fact that formal care services are provided by different categories of professionals working at different hierarchical levels in long-term care, including registered nurses, nursing aides, health and social care workers, social workers, home helpers, therapists and case managers was reflected in the research design. Shortcomings in, among other things, coordination, multidisciplinary working and organisational framework conditions became evident. However, it could be shown that staff in long-term care has started to develop and identify an own identity of the sector, with specific consequences for their job satisfaction and their role in assessing, monitoring and improving quality. The study was commissioned by the Chamber of Labour for Vienna, which will translate the results into further activities in the area of long-term care, namely by its role in the legislative process and other on-going reform processes. Kai Leichsenring **Head of Project** Michael Fuchs, Katrin Gasior, Kai Leichsenring, Katharine Schulmann **Project Team** Chamber of Labour for Vienna Financed by

#### Scoping Study on Communication to Address and Prevent Chronic Diseases

2014 - 2015

Ricardo Rodrigues (rodrigues@euro.centre.org) Contact The purpose of the scoping study was to deepen the knowledge base Aims surrounding existing communication campaigns addressing chronic diseases in Europe, and to develop communication tools to build more effective campaigns in this area for policy-makers at the European level, with a particular focus on cross-border health promotion activities. Led by ICF International in partnership with the European Centre and the LAMA Development and Cooperation Agency, the study consisted of (1) a systematic review of policy and scholarly literature to first gain an understanding of the challenge posed by chronic disease in Europe and policy responses to date; (2) the collection of case-studies of communication campaigns targeting risk factors for chronic diseases, and a 'call for evidence' to experts from across Europe in order to be able to draw on lessons learnt; (3) an expert workshop to define a series of Key Design Principles for the development and implementation of communication campaigns to tackle chronic diseases; and (4) a series of expert focus groups to validate and expand on the Key Design Principles. The European Centre was responsible for convening and carrying out the Results four focus groups validating the Key Design Principles, with one focus group for each of the main risk factors for chronic diseases (alcohol consumption, smoking, unhealthy diet, and sedentary lifestyle). Experts from a wide range of professional backgrounds, including medical clinicians, media and communications professionals, representatives from EU-level advocacy associations and international health bodies participated in the focus groups. The participating experts shared the view that in order to ensure the success of cross-border communication campaigns, long-term financing, a well-developed project evaluation cycle, and the active involvement of local stakeholders in the development and implementation of communication campaigns, is vital. A detailed report on the study design and main results is scheduled to be published by DG Santé in the last half of 2015. The study was financed by DG Santé in the context of a framework contract with ICF International, with the European Centre collaborating as subcontractor. External Fraser Battye, ICF International Consulting Services, Ltd **Head of Project Ricardo Rodrigues** Head of Project EC Stefania Ilinca, Ricardo Rodrigues, Katharine Schulmann **Project Team EC** DG Santé (formerly DG SANCO) – European Commission Financed by

## Review of the State of the Art on ICT-enabled Social Innovation in the Domains of Prevention, Health Promotion and Rehabilitation within the Area of 'Active and Healthy Ageing and Long-term Care for Older People'

2015

Contact	<u>Stefania llinca</u> (ilinca@euro.centre.org)
Aims	The review of the state of the art on ICT-enabled social innovation in the areas of prevention, health promotion and rehabilitation was carried out by the European Centre in order to identify current developments in the use of ICT's within health and social care services to address the challenge of demographic ageing in innovative ways. The state of the art review is part of a three-year study (IESI) being carried out by the IPTS unit – DG JRC to support the implementation of the European Commission's Social Investment Package (SIP) by providing a greater understanding of how ICT-enabled social innovation can contribute to social investment policies, specifically to the modernisation and expansion of social protection systems.
Results	A systematic review of the academic and grey literature revealed that while a wide array of socially innovative initiatives with ICT components are in the process of development in all three domains of interest, and have potential to improve older users' autonomy and physical and psycho-social well-being, the capacity for scaling-up and mainstreaming such initiatives has thus far been limited. A key barrier to scaling-up identified by the review is the lack of rigorous methodology applied to the testing of prototypes and ICT-based solutions, and the focus of developers on design elements and usability rather than on issues related to diffusion. Related to this, few countries have, at the national level, taken the necessary steps to promote long-term sustainability of ICT-enabled social innovations in the area of active ageing and long-term care.
External	
Head of Project	Gianluca Misuraca, Institute for Prospective Technological Studies (IPTS), DG Joint Research Centre (DG JRC)
Head of Project EC	Ricardo Rodrigues
Project Team EC	Stefania Ilinca, Ricardo Rodrigues, Katharine Schulmann
Financed by	JRC-IPTS in collaboration with DG EMPL – European Commission

#### **Coordinated / Integrated Health Services Delivery**

In-depth Description of the System Enabler 'Incentives'

2014 - 2015

Kai Leichsenring (leichsenring@euro.centre.org) Contact This contribution to the development of a Framework for Action towards Aims Coordinated/Integrated Health Services Delivery (CIHSD) by the WHO Regional Office for Europe aimed at providing evidence-based knowledge to underpin the Framework's concepts and strategies by analysing a number of 'system enablers' such as accountability, competencies, communication, innovations and incentives. In the latter case the objective was to identify obstacles and drivers for integrated health services delivery with a focus on the financial incentives for purchasers/commissioners, providers and patients/users. Based on an extended literature review a background paper was presented and discussed at the Second Technical Meeting on CIHSD in February 2015 (Istanbul). A final version that will feed into the further development of the Framework for Action was delivered by March 2015. It has been shown that in most health systems there are currently important financial disincentives for more collaborative/coordinated, or integrated health services delivery. Still, new policies, tools and mechanisms have emerged that move away from 'pay-for-service' models towards more value-based and people-centred funding models with a potential to incentivize coordination and integration of care pathways and/or care providers. Yet, first steps towards 'value-based' payment models have in general been taken incrementally and/or as part of broader and on-going health reforms, thus increasing methodological problems to assess and evaluate their impact, if considered at all, on coordinated/integrated health services delivery across the continuum of care. Further research is needed to overcome purely diseaseoriented programmes and a lack of systems-thinking in developing integrated health services delivery. External Juan Tello and Viktoria Stein (WHO Europe) **Heads of Project** Kai Leichsenring **Head of Project EC** WHO Regional Office for Europe Financed by

Special Activity "Mainstreaming Ageing: Indicators to Monitor Implementation" (MA:IMI)

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#### MA:IMI - Mainstreaming Ageing: Indicators to Monitor Implementation (II)

#### Second Phase of the Work Programme

2008 - 2014

The European Centre has been mandated to undertake various follow-up Background activities of the so-called "Madrid International Plan of Action on Ageing" since 2002. This work was supported by the Austrian Government (through the Ministry of Social Security, Generations and Consumer Protection and the Ministry for Foreign Affairs). The work has been undertaken in collaboration with and with the assistance of the United Nations Economic Commission for Europe (UNECE) Secretariat and its Population Ageing Unit (PAU) and the newly established UNECE Working Group on Ageing. This formal collaboration between the European Centre and UNECE, originally under the auspices of the Austrian Federal Ministry of Social Security, Generations and Consumer Protection, was laid down in 2004 in form of a "Memorandum of Understanding". A new Memorandum of Understanding between UNECE and EC has been signed in March 2009 extending the project until February 2014. For information on the First Phases of the project see: Preparatory and Conference Phase: 2001–2002 and Follow-up Phase of the "Monitoring RIS for the MIPAA".

Aims

The main goal of the MA:IMI project has been to provide scientific and technical assistance to governments in implementation and monitoring of their actions on ageing within the UNECE region (56 Member States) by the following steps:

- To promote an exchange of information, experiences and good practices in ageing-related policies;
- To carry out and foster data collection, research and analysis;
- To maintain a network of organisations, national authorities, NGOs and other concerned bodies and individuals active in the field of ageing; and
- To disseminate results.

An overview of work undertaken in the second phase of the MA:IMI project is summarised below:

- Prepared annual reports and provided technical assistance to UNECE to help to review and evaluate the implementation of MIPAA / RIS in UNECE Member States.
- Promoted exchange of information among experts, policy-makers and civil society by (co-)organizing and participating in various international conferences, workshops, and expert meetings.
- Developed a comparative set of gender-specific mainstreaming ageing indicators and long-term care indicators, and collected and analysed data for these two sets of indicators.
- Produced a number of publications, including three book publications, two EU Presidency Papers and several policy briefs, conference papers as well as journal articles, and disseminated findings through the website, newsletters, journals and at international conferences and workshops.

Website	http://www.monitoringris.org/
Heads of Project EC	Eszter Zólyomi, Bernd Marin
Project Coordinator EC	Eszter Zólyomi 67
Project Team EC	René Czerny, Michael Fuchs, Katrin Gasior, Kai Leichsenring, Orsolya Lelkes, Ricardo Rodrigues, Andrea E. Schmidt, Pieter Vanhuysse
Partners / Co-Organizers	UN-ECE
Financed by	Austria, Cyprus, Belgium, France, Israel, Spain, Switzerland, UN-ECE, European Commission as well as the European Centre

**International Seminars** 

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## International Seminars 2010 - 2015

Aims	The International Seminars of the European Centre provide a forum for top- level experts to present new research on current topics in social policy and welfare states, broadly defined.
	Simon Brimblecombe (International Social Security Association) Climate Change and Natural Resources Scarcity: Their Impact on Social Security 19 February 2015
	Paul Marx (University of Odense) Dualisation and the Political and Welfare State Preferences of Non-Standard Workers 22 January 2015
	Carsten Jensen (University of Aarhus) <b>Cognitive Bias and the Politics of Health Care</b> 27 November 2014
	Tomas Sirovatka (Masaryk University of Brno) Innovation in Social Services: The Public-Private Mix in Service Provision, Fiscal Policy and Employment 9 October 2014
	Herbert Obinger (University of Bremen) Warfare and the Welfare State: Causal Mechanisms and Effects 5 June 2014
	Martin Kohli (EUI Florence, em.) Cleavages and Conflicts in Aging Societies: Generation, Class, or Age? 15 May 2014
	Wim van Oorschot (Department of Sociology, KU Leuven) <b>On Actor- and System-Security</b> 10 April 2014
	Thomas Paster (Max Planck Institut für Gesellschaftsforschung, Köln) Do Business Interests Sustain the Welfare State? The Austrian Case 20 March 2013
	Marius Busemeyer (University of Konstanz) Skills and Inequality – The Political Economy of Education Reforms in Western Welfare States 16 January 2014

Achim Kemmerling (Central European University) The Political Economy of Reversing Pension Reform: Why Do Some Countries Renationalize and What Does it Imply for Policy Diffusion Research? 5 December 2013

Raanan Sulitzeanu-Kenan (The Hebrew University of Jerusalem) and Reimut Zohlnhöfer (Ruprecht-Karls-Universität Heidelberg) Expectations, Motivations, and Responsibility Attribution: How Policy Surprises Affect Public Reactions to Labor Market Regulation Policies 7 November 2013

Christiane Spiel (University of Vienna) **Future Education: The School of Tomorrow** 3 October 2013

Louis Chauvel (University of Luxembourg) Welfare Regimes, Birth Cohort Imbalances and the Scarring of the Younger Generations 13 June 2013

Steve Saxonberg (Masaryk University) Culture or Institutions? What Influences the Caring Choices of Young Families? 23 May 2013

Markus Knell (Austrian National Bank) Increasing Life Expectancy and Self-stabilizing Pension Systems 30 April 2013

István György Tóth (TARKI Social Research Institute) Cross-national and Intertemporal Variations in Income Inequalities: What Do the Available Data Say? 21 March 2013

Christopher Prinz (OECD) Sick on the Job? Myths and Realities about Mental Health and Work 15 February 2013

Dimiter Philipov, Anne Goujon & Paola Di Giulio (Wittgenstein Centre for Demography and Global Human Capital; IIASA; VID/ÖAW) Ageing Dynamics of a Human-Capital-Specific Population: The Case of Italy 24 January 2013 Frank Vandenbroucke (Universities of Amsterdam, Antwerp and Leuven) Europe's Social Challenge: Why an Ambitious Social Program Is an Urgent Need for the EU and not a Luxury 5 December 2012

Roland Sigg (ex ILO and ISSA)

From Ageing as a Crisis to a Long-Life Society: The Evolving Ageing and Longevity Paradigm and Impact on Policies 19 November 2012

Alexia Fürnkranz-Prskawetz (Vienna Institute of Demography and TU Vienna) & Robert Ivan Gal (Demographic Research Institute, TARKI Social Research Institute and Corvinus University Budapest) The Sustainability of the Austrian and Hungarian Welfare

State: An Application of National Transfer Accounts 15 November 2012

Stein Ringen (Green College, Oxford) What Kind of Welfare State Is Emerging in China? 27 September 2012

Ariela Lowenstein (University of Haifa) Generational Intelligence 21 September 2012

Rocio Fernández-Ballesteros (Autonomous University of Madrid) Active Ageing. Conceptual and Methodological Issues 7 September 2011

Lucy Burns (University of New South Wales) Drug Use by Older Australians 9 May 2011

Robert Holzmann (Marseille Center for Mediterranean Integration – MCMI) Severance Pay Programs across the World: History, Rationale, Status, and Reforms 8 April 2011

Judit Vall Castello (Universitat Pompeu Fabra, Barcelona) Business Cycle Effects on Labour Force Transitions for Older People in Spain | February 2011

Bernard Casey (University of Warwick and Cass Business School, UK) Are We All Confucianists? Similarities and Differences between European and East-Asian Policies for Care of the Frail Older People 23 July 2010

Robert Holzmann (Marseille Center for Mediterranean Integration – MCMI) Portability of Pension, Health, and other Social Benefits: Facts, Concepts, Issues 29 June 2010 European Centre Publications 2012 - 2015

Publications Officer: Willem Stamatiou Graphics & Design: Barbara Waldschütz Internet: http://www.euro.centre.org

#### Book Series "Public Policy and Social Welfare" (1990-2010)

(Ashgate, Farnham UK) English

Started in 1990, it contains monographs and collected volumes focusing on outcomes of the Centre's research projects or expert meetings. Studies published in the series are mostly cross-national and comparative, interdisciplinary, and empirical, with both a theoretical and a policy orientation.

#### Buchreihe "Wohlfahrtspolitik und Sozialforschung" (1993-2007)

(Campus Verlag, Frankfurt / New York) German

Started in 1993 for German publications or translations of important books into German. It covers welfare policy and links it to both political and social theory as well as to social research.

#### **Other Book Publications**

Various Publishers and Languages

Several books or special reports produced by European Centre researchers and collaborating scholars have been, and continue to be, published outside the above series, with a variety of established publishing houses.

#### **Occasional Reports Series**

English / French / German

This series presents the results of European Centre projects that have high relevance for ongoing policy discussions and therefore need speedy publication possibilities. Occasional Reports support decision-making processes and policy formulation and inform a wider public about empirical findings in areas under current media discussion.

#### **Policy Briefs**

English / French / German / Spanish

Policy Briefs are a publication series that provides a synthesis of issues of research and policy advice on which the European Centre researchers have been working. All Policy Briefs are accessible on the website of the European Centre, http://www.euro.centre.org

Other Publications by EC Researchers including Journal Articles, Review Articles, Chapters in Books, Working Papers and Reports, Conference Papers, i.e. "Grey Literature".

English / German / Various Languages

#### Newsletter

English

Published in the middle of each month, it reports on recent activities and publications within the European Centre's programme of research.

#### Programme Catalogue / Annual Report of Activities

English

Published in Autumn, it comprises approximately 200 pages, and provides very detailed information about the European Centre's programme activities and publications.

#### EUROSOCIAL Reports Series (1974-2003)

English / French / German

A report consists of 60 to 200 pages and may be a conference synthesis, a state-of-the-art document, may summarize the most significant of the contributions presented at an expert meeting, or be a national or regional report resulting from a particular project. This series has been discontinued in 2003.

#### Journal für Sozialforschung (1989-1996)

German

Beginning with the year 1989, the European Centre started to publish the "Journal für Sozialforschung", until 1992 in cooperation with Campus Verlag. The "Journal" was issued quarterly and was one of the widely read and reputed social science journals in German-speaking countries, regions and communities throughout Europe. It was the only social science journal in Europe that continuously reported on international public opinion poll data in politics, economy and society, by multicoloured pictorial statistics (pictograms). The *Journal für Sozialforschung* was closed down in 1996.

# Book Series "Public Policy and Social Welfare", vols. 30-38

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# The Future of Welfare in a Global Europe

#### Bernd Marin (Ed.)

Ashgate 2015

This book is the outcome of a scientific symposium at the occasion of the 40th anniversary of the European Centre for Social Welfare Policy and Research, 15 September 2014. During this jubilee event, a large number of well-known European academics delivered contributions to the overarching theme of "The Future of Welfare in a Global Europe".

Besides an extended Introduction by the Editor Bernd Marin, the volume is structured into seven parts: Part I: From Warfare to Welfare and Workfare (Herbert Obinger and Klaus Petersen) – Part II: Demographic Metabolism, New Measures of Age and Ageing, and the Active Ageing Index (AAI) 2012-2015 (Wolfgang Lutz / Warren C. Sanderson and Sergei Scherbov / Asghar Zaidi) – Part III: Towards a Human Investment State: Future-Able Education, Skill Formation, and Economic-Financial Literacy as Prerequisites of Sustainable Welfare Society (Marius R. Busemeyer / Pieter Vanhuysse / Elsa Fornero) – Part IV: Class, Generation, Gender, and Age Cleavages in Ageing Societies (Martin Kohli / Agnieszka Chłoń-Domińczak / Alexia Fürnkranz-Prskawetz) – Part V: Too Sick to Work? Disability – and Happiness – in Stressful and Long-Life Societies (Christopher Prinz / Orsolya Lelkes) – Part VI: Fragile Welfare Sustainability: Two Model Cases in Point (Joakim Palme / Bert Rürup) – Part VII: No European Social Model in Europe – or towards a Social Union? (Bernd Marin / Frank Vandenbroucke).

Bernd Marin is Executive Director of the European Centre for Social Welfare Policy and Research in Vienna, Austria.

#### Welfare in an Idle Society? Reinventing Retirement, Work, Wealth, Health, and Welfare

#### **Bernd Marin**

Ashgate 2013

This book is about making welfare society sustainable for the 21st century. What design is required to turn social security into a lasting human institution and civilizing achievement? It attempts at reinventing rather than privatizing social security in general, and pensions in particular.

The key aim of welfare through social insurance is eradicating the five giant social ills of Want, Ignorance, Disease, Squalor and Idleness, providing a minimum standard of living. All people of working age pay regular contributions; in return, benefits are awarded to anyone who is sick, unemployed, retired or widowed. The modern welfare state, therefore, is about maintaining a delicate equilibrium between dependent social groups on the one hand and the active working classes on the other. In the case of old-age security, this balance is being achieved (or not) by the so-called Generation Contract. This social pact is more of an implicit, unwritten and unspecified social compact, or "contracting without contract".

The book sees the welfare state as one of the great achievements of the post-war 20th century, albeit one greatly in need of a profound overhaul. This modernization of welfare amounts to nothing less than re-thinking its basic philosophy, core concepts, fiscal base, organizing principles, policies and programmes. Notably, this applies to the pension schemes and their manifold and intricate interfaces with labour markets, health insurance, disability welfare, social policies, and other social security institutions.

The focus is on re-designing social security to cope with global ageing and to guarantee a viable 21st century pension future. In many European countries, the most imminent menace is neither financial market risks nor population ageing (whether deriving from longevity, low fertility, or scant immigration). To the contrary, demographics per se presents many more opportunities than threats and dangers. Pensions and social security systems are eroded, instead, by insufficient activity and employment rates to adjust for accelerating demographic and economic challenges.

Thus, the focal point of this book is less on imbalances between old and young, but on imbalances between the active and the inactive, between work and non-work over the lifetime, and between working, earning and contributing classes and dependent groups (Karl Renner's *"Erwerbsklassen"* vs. *"Versorgungsklassen"*) at any given point in time. Its "leitmotiv" running through is in the main title: "Welfare in an Idle Society?" How generous and sustainable is a welfare state with low levels of activity? How petty must a pay-as-you-go pension and social security system turn with insufficient paid work, when dependent population groups constitute a majority, and most people now spend most of their lifetime out of work?

Correspondingly, the book centres on work and welfare. To work – or not to work enough. How much idleness is sustainable within an advanced welfare society? How many years of unemployment, non-employment, long-term sickness, disability or invalidity pensions or other paid and unpaid, voluntary and involuntary out-of-work periods are consistent with what welfare standards and pension duration? How much social insurance and old-age pension is affordable with more than 18 years of non-contributing periods during working age and more than 25 years of retirement on average, as is the case in Austria? For the EU-28, more than 100 million non-employed people need to be added to the 27 million unemployed to make up the overall pool of out-of-work potential or labour slack. The book concentrates on single cases such as Austria or Sweden, but in a comparative UN-56 (not just EU-28) European and global OECD perspective. It deals with the countries chosen as cases in point of some general challenges and efforts to cope with them effectively. It tries to determine the specificity and, at times, the exceptionalism of single cases, and analyses the respective strengths and weaknesses of different national approaches and their organizing principles. Apart from analytical concepts and empirical investigations for knowledgeable observers, it pursues a didactic approach and also aims to communicate to the general reader and citoyen, who is interested in public affairs.

And it sets out the main public choices countries in the heart of the continent are confronted with. In a first choice, Continental Europe may be moving towards either a North-Western or a South Eastern and Mediterranean Europe. North-Western Europe has much more in common than is conventionally perceived by frequent accounts of an alleged antagonism between Anglo-Saxon liberalism and Nordic Social Democratic hegemony, both deeply rooted and independent from changing goverment complexions. Indeed, there is what is called an underlying "liberal-socialist consensus", an "Anglo-Scandinavian" or Swiss way of "work and welfare societies", though with quite different work and welfare mixes. Later, a second choice between "going Swedish" or "going British" with respect to pensions presents itself.

Work societies are characterised by a primacy of formal market (system of national accounts/SNA) production and paid work, creating ample riches in order to aliment more or less generous welfare and social security "from cradle to grave". But providing safety nets and minimum living standards "below which no one should be allowed to fall" in the sense of William Beveridge can only be sustained if the animal spirits of entrepreneurship, capitalist enterprising, pervasive innovation and productivity increases are left unfettered, and if economic competitiveness and high employment rates are maintained. The alternative for Continental Europe to this highway towards North-Western Europe would be drifting even further towards the low-work country profiles of South-Eastern, Balkan, and Mediterranean societies, with a prevalence of informal and household (non-SNA) production, early labour market exit pathways – and correspondingly shabby – or shady – benefit regimes.

This ground-breaking book demonstrates how countries are addressing population-ageing challenges in depth, using single case studies to gain the required complexity and differentiation in a comparative European framework of empirical evidence. This is a broad social science study in political economy and sociology, not an economic analysis. It has been widely endorsed by leading scholars in the field of ageing and welfare as required reading for all social scientists, economists and social policy experts working within this areas.

Content Overview: Part I Global Challenges and 21st Century Austrian Pension Future: Introduction: the policy issues at stake and the task in hand; Sustainable welfare societies: new guiding principles; What is a 'pension'?; Why are 'pensions' so crucial?; Why do pensions urgently need to be consolidated? Austriaka continued: the national context of pension consolidation in a comparative perspective; Pension consolidation in a low-work country? What is to be done? Strategic perspectives on a new model of pension consolidation. Part II Doomed to Fail – or Robust, Fair, and Sustainable? Reinventing Social Security, Welfare and Self-Governance: Demographic transition and marginalization, migration and social (dis)integration; living longer, working shorter – or longer? The limits of sustainable welfare societies; Extending working life incentives for companies: conventional and innovative approaches; Close to 'best practice'? The Swedish NDC model as a yardstick for pension modernization and social progress?; NDC – a magic all-European pension reform and coordination formula? Part III Invalidity Pensions – or Disability Insurance?: What does invalidity/disability mean? Mainstreaming invalidity/disability from destiny to self-determination? And from 'bone-rates' of 'abnormality' to normalcy? The ambiguity of modern disability welfare: success story or political fiasco? Towards an employment-oriented equal opportunity model: a second or completed paradigm shift? Cautionary postscript as an appendix: forever beyond the Dark Ages of sin, stereotypes, stigma, sanitizing - and medical killing? Appendix: facts and figures on invalidity and disability welfare. Part IV Women's Work and Pensions: Gender-Sensitive Arrangements; Recent pension reforms – and their impact on women; General gender and pension analyses; Single and comparative country studies; What is good, bad, best for women? Some preliminary conclusions; Appendix: some facts and figures on women's lives, work and pensions; Bibliography.

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Das Buch adressiert die theoretisch wie praktisch-politische Kernfrage, wie man moderne Wohlfahrtsgesellschaften nachhaltig macht, indem man soziale Sicherheit in eine dauerhafte Humaninstitution und selbsttragende zivilisatorische Errungenschaft weiterentwickelt.

Wohlfahrtsgesellschaft ist eine große historische Errungenschaft des 20. Jahrhunderts und keineswegs per se überholt, aber – angesichts (selbst)zerstörerischer Tendenzen dringend überholungsbedürftig. Ihre Modernisierung erfordert eine Neudefinition der Philosophie, Schlüsselkonzepte, Finanzierungsbasis, Organisationsprinzipien, Sozialpolitiken und Programme. Re-Design sozialer Sicherheit bedeutet Neuerfindung von Ruhestand, Arbeit, Wohlstand, Gesundheit und Wohlfahrt.

Dabei geht es nicht um Ungleichgewichte zwischen "jung und alt", sondern zwischen aktiv und inaktiv, Arbeit und Nicht-Arbeit, produktiv berufstätigen Arbeiterklassen und beitragenden "Erwerbsklassen" und abhängigen "Versorgungsklassen" (Karl Renner). Das Kernproblem Europas sind die 127 Millionen out-of-work im besten Erwerbsalter: rd 100 Millionen Erwerbslose zusätzlich zu den zuletzt fast 27 Millionen Arbeitslosen.

Kontinentaleuropa kann sich strategisch nach Nord-West-Europa oder nach Südost-Europa und den Mittelmeerraum orientieren: anglo-sächsischer Liberalismus und nordische sozialdemokratische Hegemonie in Skandinavien haben miteinander (und mit der Schweiz, Holland) mehr gemeinsam als mit dem Rest Europas, man könnte von "anglo-skandinavischen Arbeitsgesellschaften" sprechen. 70 Jahre nach Beveridge und 140 Jahre nach Bismarck muss soziale Sicherheit neu erfunden werden – so radikal wie von Beveridge selbst.

Schon EU-Kommissar Verheugen bestritt, dass es ein "europäisches Sozialmodell" in Europa gäbe. Seit 1973 sind die drei großen Wohlfahrtsversprechen – Vollbeschäftigung, produktivitätsorientierte Einkommenszuwächse und sichere Pensionen bzw. soziale Sicherheit und Humandienstleistungen für Bildung, Gesundheit, Pflege und Soziales – trotz höchster und teilweise weiter steigender Sozialausgaben ständig gebrochen bzw. schrittweise widerrufen worden. Derzeit haben wird das Paradox einer neuen "misère du monde" (Bourdieu) – auf den höchsten Stufen je erreichten sozialen und zivilisatorischen Fortschritts – und messbar sinkende Lebenszufriedenheit selbst bei steigendem Wohlstand und Wohlfahrt. Ist daher das EU-"europäische Sozialmodell" nur eine rhetorische Fiktion wie etwa der Wachstums- und Beschäftigungspakt, der Europäische Wirtschaftsraum – oder dysfunktional wie die Euro-Zone? Ganz offensichtlich stimmen Worte, Taten und Resultate des "europäischen Sozialmodells" nicht zusammen. Sozialstaatsdefekte wie Inaktivität und Abhängigkeit einer Mehrheit von Versorgungsempfängern gemahnen mitunter an selbstnegatorische Eigendynamiken (wie KIKS, kopfschmerzmedikamenteninduzierte Kopfschmerzen), wo bei "Arbeit lohnt nicht" Markt- und Staatsversagen ineinander greifen und einander wechselseitig verstärken. Das lässt sich an der bestürzenden und die längste Nachkriegszeit für "unmöglich" gehaltenen Massen- und Langzeitarbeitslosigkeit ebenso zeigen wie an massenhafter Invalidität und Berufsunfähigkeit. Bereits am Beispiel der sog. Stockholm-, Lissabon- und Barcelona-Ziele der EU lassen sich die "low future"-Aspirationen, die inzwischen in Südeuropa in katastrophische "no future"-Resignation für die jüngeren Generationen gekippt sind, ablesen. Hat das "europäische Sozialmodell" vergleichbare Konstruktionsfehler wie die Euro-Zone? Gibt es dieses "europäische Sozialmodell" nur für 3-10% der Europäer (Schweden, Finnen, Dänen, Norweger, Isländer, Holländer, Luxemburger, Schweize, Österreicher und evv. Deutsche?) Bereits in der EU-27 gibt es derzeit fast unüberbrückbare wirtschaftliche Heterogenität, sozio-kulturelle Diversität und unterschiedliche gesellschaftspolitische Visionen, das UN-"Europa der 56" Länder wächst noch weniger zusammen, sondern droht weiter auseinander zu driften.

Das Buch analysiert welfare-mixes als politische Gesamtkunstwerke und europäische Governance durch "soft law" wie die OMK-Praxis. Dabei ist der West/West-Glaubenskrieg zwischen Anhängern des traditionellen "Sozialstaats" und "freier Märkte" ebenso überholt wie der Ost/West-Gegensatz zu Zeiten des "Ostbock"-Kommunismus: im Kontrast zu den vorgestrigen ideologischen Gegensätzen entwickeln sich seit Mitte der 1990er Jahre neue Konvergenzen und ein neuer Konsens. Jenseits von Sozialstaats-Paternalismus und Laissez-faire Darwinismus entsteht ein neues Konzept von "welfare mix" und "Wohlfahrtsgesellschaft". Ein 5-Sektor-Modell der Wohlfahrts-Produktion und 12 Grundsätze einer neuen Wohlfahrts-Philosophie in einer Human-Investitions-Perspektive werden entworfen, wobei Sozialpolitik in einer sozialen Marktwirtschaft sowohl mit dem Markt wie auch mitunter gegen den Markt entwickelt wird. Mit einem sozialverträglichen Sozialumbau entstehen neuen Konfliktlinien wie auch neue Kompromisspotenziale.

Das Buch zeigt auch, weshalb sich unsere Gesellschaften verjüngen und nicht altern, an Hand der Schlüsselbegriffe "Altersinflation" und "Lifetime Indexing". "Jung" und "alt" sind weder unabhängig von Raum und Zeit, noch von Konzepten und objektiven Messmethoden des Alters, noch von subjektiven Wahrnehmungen. In der Öffentlichkeit herrscht große Verwirrung über grundlegende Begriffe wie individuelle und kollektive Alterung, Verjüngung, Langlebigkeit, (gesunde) Lebenserwartung in unterschiedlichen Lebensaltern, über chronologisches, prospektives, soziokulturelles, psychologisches, kognitives, biometrisches usw. Alter. In den letzten Jahren wurden in der Demographie bahnbrechend neue, dynamische Altersdefinitionen und -maße entwickelt, die veränderte Gesundheit, Sterblichkeit, Überlebenswahrscheinlichkeiten, kognitive und Arbeitsfähigkeit sowie Lebenslaufmuster berücksichtigen. Damit erweisen sich ausschließlich herkömmliche, chronologische, statische Altersmaße und darauf aufbauende Kennzahlen als gefährlich irreführend. Wer die Altersinflation, den Unterschied von nominalem und realem Alter als Stadium im Lebenszyklus nicht durch Lifetime Indexing berücksichtigt, versteht "(aktives) Altern" nicht. Es wird gezeigt, wo und wie "40 das neue 30", "73 das neue 65" ist, was Wiedergeburt mit 38 oder 50 oder 82 bedeutet – und dass sich unsere Gesellschaften (etwa Wien) tatsächlich "verjüngen" statt zu "altern".

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# Das österreichische Gesundheitssystem Akteure, Daten, Analysen

#### Maria M. Hofmarcher

MWV Medizinisch Wissenschaftliche Verlagsgesellschaft 2013

In her new book Maria M. Hofmarcher comprehensively describes the current structure of the Austrian health care system with its economic and political contexts. In addition, current and planned reform initiatives are described and analyzed. The book is a comprehensive reference work on the health care system in Austria written for all stakeholders, decision- and policy-makers in health care and health industry. It provides extensive data on the health care system and the impact of reforms including an analysis of legislation and reform initiatives in Austria.

Das Werk stellt die aktuelle Struktur des österreichischen Gesundheitssystems mit den ökonomischen und politischen Zusammenhängen umfassend dar. Zudem werden die laufenden und geplanten Reforminitiativen in Österreich beschrieben und analysiert. Das Buch enthält umfangreiche Daten, Fakten, Definitionen und Analysen zum österreichischen Gesundheitssystem und ist eine einmalige Informationsquelle für alle Akteure, Entscheider und Gestalter im Gesundheitswesen und in der Gesundheitswirtschaft.

- umfassendes Nachschlagewerk über das Gesundheitssystem in Österreich
- umfangreiche Daten über das Gesundheitsversorgungssystem und die Auswirkungen von Reformen
- · einmalige Informationsquelle für alle Beteiligten im Gesundheitssystem
- mit Analysen der Gesetzgebung und Reforminitiativen in Österreich

Aus dem Inhalt: Einführung und Historischer Hintergrund; Struktur des Gesundheitssystems; Planung, Regulierung und Management; Dezentralisierung des Gesundheitssystems; Finanzierung und Ausgaben des Gesundheitssystems; Die soziale Krankenversicherung; Gesundheitsleistungen und Rationierung; Zusätzliche Finanzierungsquellen; Gesundheitsausgaben; Leistungserbringung im Gesundheitssystem; Öffentlicher Gesundheitsdienst; Prävention und Gesundheitsförderung; Ambulante Gesundheitsversorgung; Stationäre Gesundheitsversorgung; Ambulante und stationäre Langzeitversorgung; Integration der Leistungserbringung; Gesundheitspersonal und Ausbildung; Arzneimittel; Technologiebewertung im Gesundheitssystem und eHealth; Verwendung der Finanzmittel im Gesundheitssystem; Budgetsetzung und Ressourcenallokation; Vergütung von Krankenhäusern; Vergütung von Ärzten; Reformen im Gesundheitssystem; Zielvorgaben; Inhalte von Gesundheitsreformen.

Maria M. Hofmarcher is Head of Health and Care Programme at the European Centre for Social Welfare Policy and Research in Vienna, Austria.

Long-Term Care in Europe Improving Policy and Practice

#### Kai Leichsenring / Jenny Billings / Henk Nies (Eds.)

Palgrave Macmillan, 2013

This book challenges the prevailing discourse centred on the problems of demographic change and long-term care provision for older people by focusing on solutions emerging from progression and improvement in policy and practice. Building on ample research in 13 European countries, evidence is provided for how the construction of long-term care systems can be taken forward by practitioners, policymakers and stakeholder organisations. By focusing on prevention

and rehabilitation, the support of informal care, the enhancement of quality development as well as decent governance and financing mechanisms for long-term care, stakeholders my learn from European experiences and solutions at the local, regional and national levels.

Kai Leichsenring is Associate Senior Researcher at the European Centre for Social Welfare Policy and Research in Vienna, Austria; Jenny Billings is a Reader in Applied Health Research at the Centre for Health Service Studies (CHSS) at the University of Kent, UK; Henk Nies is CEO of Vilans, The Netherlands Centre of Expertise for Long-term Care. He is also Zonnehuis Chair and Professor of Organisation and Policy Development in Long-Term Care at VU University Amsterdam, The Netherlands.

# Can Technology-based Services Support Long-term Care Challenges in Home Care?

Analysis of Evidence from Social Innovation Good Practices across the EU: CARICT Project Summary Report

Stephanie Carretero / James Stewart / Clara Centeno / Francesco Barbabella / Andrea Schmidt / Frédérique Lamontagne-Godwin / Giovanni Lamura

European Commission, Joint Research Centre Scientific and Policy Reports, 2012

Deployment and use of technological services for informal carers is still limited, mainly due to users' low digital skills, the lack of demonstrated business cases, and the poor evidence of the impact and sustainability of these services. The CARICT project aimed to collect evidence-based results on the impact of ICT-enabled domiciliary care services, and to make policy recommendations to develop, scale and replicate them in the European Union. The methodology was based on a mapping of 52 ICT-based services for informal carers developed in Europe, and a cross-analysis of 12 of these initiatives to get data on their impacts, drivers, business models, success factors, and challenges.

The main results show that there is a wide range of successful, not very costly and beneficial examples of ICT-based support for carers across Europe. The cross-analysis indicated that these services had positive impacts on the quality of life of elderly people and informal carers, the quality of care and the financial sustainability of the health and social systems.

The data also confirm that policy at European, national, regional and local levels can promote the successful development, implementation and transferability of these services through funding, policy leadership and by promoting stronger cooperation among stakeholders including end-users, mainly from the third sector and informal carers, to create a new value chain in the provision of long-term care. These findings help to achieve the objectives of European policy defined by the 2020 Strategy, and more specifically the Digital Agenda for Europe (DAE) and the European Innovation Partnership on Healthy and Active Ageing (EIP AHA).

# **Geld- versus Sachleistungen**

Wirkungsweisen und Effekte von Geldleistungen und Sachleistungen im Sozialbereich

#### Michael Fuchs / Kai Leichsenring / Bernd Marin / Georg Ruppe / Pieter Vanhuysse

Magistratsabteilung 24 - Gesundheits- und Sozialplanung, Wiener Sozialpolitische Schriften Band 5, 2012

Zur Planung und Ausrichtung von Sozialleistungen ist ein fundierter Überblick über deren Wirkungsweisen und Effekte gemessen an den Zielsetzungen unumgänglich. Ob eine Leistung als frei verfügbare Geldsumme oder als Sachleistung effizienter und nachhaltiger wirkt, sollte wissenschaftlich fundiert und abseits ideologischer Mythen diskutiert werden. Die vorliegende Studie beleuchtet den empirischen und theoretischen Hintergrund der Fragestellung anhand einer tiefgehenden Literaturanalyse und diskutiert und bewertet sozialpolitische Konzepte hinsichtlich der jeweiligen Realisierungspotenziale ihrer Zielsetzungen sowie möglicher intendierter und nicht intendierter Effekte.

Weiters werden auf Basis sozialpolitisch wirkungsrelevanter Kriterien ausgewählte Wiener Sozialleistungen analysiert und alternative Angebotsoptionen besprochen. Dem Bereich der Pflege ist ein gesondertes Kapital gewidmet, da hier die gewachsenen Strukturen sowohl eine Geldleistung (mit dem Pflegegeld durch den Bund) als auch eine Sachleistung (durch die stationären und mobilen Pflegeangebote der Länder) vorsehen. Die Studie beleuchtet die derzeitige Versorgungssituation und die Anforderungen an neue und innovative Konzepte angesichts der demografischen Herausforderungen.

In Österreich wird ein Mix aus Geld- und Sachleistungen angeboten, wobei Geldleistungen, wie auch in anderen kontinentaleuropäischen Wohlfahrtsstaaten, den deutlich überwiegenden Anteil darstellen. Die Nordischen Staaten tendieren hingegen stärker zu Dienst- bzw. Sachleistungen. Generell ist in den OECD-Staaten ein aktueller Trend in Richtung Sachleistungen festzustellen. Während die Literatur zur Wohlfahrtsökonomie im Allgemeinen nahelegt, dass Geldtransfers aus Gründen der Effizienz unter regulären Marktbedingungen zu bevorzugen sind, spezifiziert sie mit theoretischen Ansätzen auch ein breites Spektrum von Argumenten, die für Sachleistungen, Bedürftigkeit zu überwinden. So könnten zum Beispiel bei der Weiterentwicklung der Bedarfsorientierten Mindestsicherung vermehrte Arbeitsintegrationsangebote für bestimmte Zielgruppen den Ausstieg erleichtern. Zusätzlich könnten die Wirkungsweisen von Sozialleistungen genauer überprüft werden, sodass negative Anreize vermieden werden.

"Paternalistische" Interventionen durch Sachleistungen werden bei Leistungen für Kinder zur Verbesserung der Chancengerechtigkeit und der innerfamiliären Umverteilung auf breiter Ebene akzeptiert, bei anderen Zielgruppen jedoch auch kritisch diskutiert.

Mit Sachleistungen können weiters multiple politische Ziele verfolgt werden, die über das direkte Ziel der Unterstützung bedürftiger Personen hinausgehen. Durch öffentlich finanzierte Angebote, etwa im Pflegebereich, können zum Beispiel auch Erwerbsquoten erhöht werden. Es können aber auch nicht intendierte Effekte eintreten, wenn, wie in den USA, Lebensmittelprogramme zur Agrarförderung mutieren.

Der Mix an Geld- und Sachleistungen für Wienerinnen und Wiener gewährleistet einen hohen sozialen Versorgungsgrad. Dabei werden die Bundesleistungen wie Pensionen, Arbeitslosenbezüge oder Pflegegeld als Geldleistungen, die Landesleistungen wie Wohnungslosenhilfe, Behindertenhilfe, stationäre und mobile Pflegedienste als Sachleistungen zur Verfügung gestellt. Eine wichtige Geldleistung des Landes stellt die Bedarfsorientierte Mindestsicherung dar. Die Pflegegeldergänzungsleistung für persönliche Assistenz bietet Wahlfreiheit und Autonomie bei der Einteilung der Assistenz und garantiert durch genaue Abrechnungskontrolle auch eine widmungsgemäße Mittelverwendung.

Im Pflegebereich wird besonderes Augenmerk auf Angebote der integrierten Versorgung sowie die Unterstützung der informellen Pflege zu legen sein. Durch den Ausbau professioneller, ergänzender mobiler und teilstationärer Betreuungsdienste können Angehörige entlastet und Akzente zur Steigerung der Erwerbsquote gesetzt werden. Zusammenfassend kann aus den Studien-Ergebnissen bei bestimmten Fragestellungen eine Empfehlung in Richtung Sachleistungen – trotz zum Teil höherer administrativer Kosten – abgeleitet werden. Diese wirken tendenziell nachhaltiger, treffsicherer, effizienter und erhöhen das sozialpolitische Steuerungspotential. Allerdings muss bei der Implementierung das Risiko einer (zu weit gehenden) "paternalistischen" Bevormundung der Klientinnen und Klienten sowie anderer nicht intendierter Nebeneffekte berücksichtigt werden.

# Ageing Populations in Post-Industrial Democracies: Comparative Studies of Policies and Politics

#### Pieter Vanhuysse / Achim Goerres (Eds.)

Routledge / ECPR Studies in European Political Science, 2012

Most advanced democracies are currently experiencing accelerated population ageing. This fundamentally changes not just their demographic composition: it also can be expected to have far-reaching social, political and public policy consequences. This book brings together an array of comparative empirical analyses dealing with generational politics and public policies. It examines changing electoral policy demands due to demographic ageing and shifting lifestyles. It presents a theoretically unified, case study approach.

Contributors to Ageing Populations in Post-Industrial Democracies include: Stefan Svallfors (Umea University, Sweden), Sean Hanley (University College London, UK), Andrej Kokkonen (Gothenburg University, Sweden), Jennifer Sciubba (Rhodes College, USA), Martin Hering (McMaster University, Canada), Juan Fernandez (Max Planck Institute, Cologne), Robert H. Hudson (Boston University, USA)

*Pieter Vanhuysse* is Deputy Director and Head of Research at the European Centre for Social Welfare Policy and Research in Vienna; *Achim Goerres* is Assistant Professor of Research Methods at the University of Cologne (Germany).

Ageing Populations in Post-Industrial Democracies websites European Centre & Routledge: http://www.euro.centre.org/detail.php?xml\_id=1925 http://www.routledge.com/books/details/9780415603829/

A new paperback edition of this book has been published in 2014.

This book has been reviewed thus far in the following 14 journals: Ageing & Society, Bulletin of Italian Politics, Canadian Journal of Political Science, Canadian Journal of Sociology, Canadian Public Policy, Czech Sociological Review (in Czech), Intergenerational Justice Review, Japanese Journal of Political Science, Journal of European Social Policy, Journal of Turkish Social Policy Conferences (in Turkish), Political Studies Review, Norwegian Journal of Social Research, Swedish Political Science Review (in Swedish), Swiss Political Science Review.

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# Facts and Figures on Healthy Ageing and Long-Term Care. Europe and North America

Editors: Ricardo Rodrigues, Manfred Huber, Giovanni Lamura Authors: Katrin Gasior, Manfred Huber, Giovanni Lamura, Orsolya Lelkes, Bernd Marin, Ricardo Rodrigues, Andrea Schmidt, Eszter Zólyomi

2012

This publication from the European Centre for Social Welfare Policy and Research (Vienna) is the result of the joint effort of a group of authors from the ECV, Istituto Nazionale di Ricovero e Cura per Anziani (INRCA) and WHO Regional Office for Europe.

# What is it about?

The 2nd edition of the Facts and Figures on Healthy Ageing and Long-term Care provides information on the ageing phenomenon across the UNECE region. It covers data and information on demography, social situation of older people, health, informal care, migrant care workers, public long-term care policies and expenditure for the countries of the UNECE.

#### Why is it important?

It is meant as a tool to inform policy debate and inform decision-making by policy-makers. It provides easily accessible information on data and facts for academic experts and researchers to aid comparative analysis of healthy ageing and long-term care. It hopes to foster debate and raise awareness of the differences in ageing across the UNECE region and what they entail for citizens.

# What to find?

Demography, Social connectedness, Income and housing situation, Health status, Risk factors and prevention, Informal care, Migrant care work, Long-term care services, Expenditure on long-term care.

Authors in alphabetical order: Katrin Gasior, Manfred Huber, Giovanni Lamura, Orsolya Lelkes, Bernd Marin, Ricardo Rodrigues, Andrea Schmidt, Eszter Zólyomi

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Vol. 8: Rodrigues, R., Huber, M., Lamura, G. (eds.) (2012) Facts and Figures on Healthy Ageing and Long-term Care. Europe and North America Vienna: European Centre, 122 pp.

- Vol. 7: Eisenbach-Stangl, I., Spirig, H. (2010) Auch Drogenabhängige werden älter... Zur Lebenssituation einer Randgruppe Wien: Europäisches Zentrum / Schweizer Haus Hadersdorf, 162 S.
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# Policy Briefs 2010 - 2015



ICY BRIEF OCTOBER 2010 EUROPEAN CENTRE · EUROPÄISCHES ZENTRUM · CENTRE EUROPÉEN

#### Social Well-being of **Disabled Older Persons** An Evidence of Unequal Ageing in Europe by Katrin Gasior and Asghar Zaidi

I. Introduction

Katrin Gasior is Researcher and Asghar Zaidi Director Research at the European Centre for Social Welfa Policy and Research, Vienna. Agubr Zuidi Dancar Reamini da Europa Canso de Saturitation Paley and ReameA'aman. Dear of the most apparent consequences of an ever-frising life expectancy Paley and ReameA'aman. Dear of the most apparent consequences of an ever-frising life expectancy a higher-dhan-erer fraction of European societize. Years gained in life are not matched equility by longer working lines and older people are elifyo-mont hair at Will amage raises and the area of the societize of the societized of

Keywords: General Welfare, Non-Labour Market Discrimination, Disability, Social and Economic Stratification

Policy Briefs are a publicati providing a synthesis of topi providing a synthesis of topics research and policy advice on European Centre researchers vorking recently.

One other rather obvious phenomenon is that older people are far from being a homogenous group, and they differ inter die with respect to social, economic and health status. Moreover, advances in medicine and rehabilitation methods have made the expectation of living to late life fairly reasonable, even for persons with a significant disability. Despite this, disability can be viewed as one of the most important factors determining the individual experience of ageing. For instance, many older people are restricted in their applications calve ageing due mainly to limita-tions linked with their ill-health and physical frailty.

Important research questions are therefore What are the perceptions, feelings and experiences of the disabled older persons? Are these persons also enjoying and benefining from a longer phase of old-age life? How to best capture these unequal acpeniences of ageling of older people Whether institutional differences arross European countries play a role in mitigating the perverse effects of disability during old age? This Brief examines this phenomenon of unequal ageing of older people in European countries by looking into how disability alone has an influence on the well-being of disable older persons, covering several different domains of social well-being.

# 2015

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Vanhuysse, Pieter, with Markus Tepe (2013) **'A Vote at the Opera? The Political Economy of Public Theaters and Orchestras in the German States'** Paper presented at the International Conference on Public Policy, Grenoble, June

Vanhuysse, Pieter, with Markus Tepe (2013) **'Taking Social Policy Personally: The Effect of Personality Traits and Regime Socialization on Welfare State Attitudes'** Paper presented at the European Consortium for Political Research General Conference, Bordeaux, September

Winkelmann, Juliane / Hofmarcher, Maria M. (2013) **'Improved Performance Assessment through a Health Data Navigator'** Paper presented at the ISQua Conference (Quality and Safety in Population Health and Healthcare), I5 October 2013, Edinburgh, UK

Winkelmann, Juliane / Schmidt, Andrea E. / Leichsenring, Kai (2013) 'Double Standards in Regulating Migrant Care Work? – Analysing Cleavages in the Care Labour Market in Austria' Paper presented at the LIEPP Conference 'Analysing the political economy of household services in Europe', Sciences Po Paris, 3-4 October 2013, Paris, France

#### Leichsenring, Kai (2012)

**'Economia politica della famiglia: modelli europei e prospettive'** Paper presented at the 'Festival della famiglia', Riva del Garda, Italy, 27 October 2012

Leichsenring, Kai (2012

**'Prevention & rehabilitation through health, social and informal care'** Paper presented at the ESN Autumn Seminar 'Retaining and regaining independence and inclusion in later life', Stuttgart, Germany, 24-25 October 2012

Leichsenring, Kai (2012)

'International perspectives on integrating health and social care services –
Towards integrated long-term care systems'
Paper presented at the 'Encuentro ETORBIZI de Innovación Sociosanitaria', Bilbao, Spain, 8-10 October 2012

Leichsenring, Kai (2012)

'Partnership Working to Overcome Barriers in Research, Policy and Practice – Towards integrated long-term care systems' Paper presented at the Fourth EAHSA Conference, Malta, 27-28 September 2012

Leichsenring, Kai (2012)

'I cambiamenti nei sistemi dei paesi del centro Europa', Paper presented at the Conference 'Il cambiamento dei sistemi di welfare: quali politiche e processi di governance?' Università Cà Foscari, Venice, Italy, 17-18 May 2012

Leichsenring, Kai (2012)

 'Constructing long-term care systems in Europe – Theoretical considerations and examples of innovative practice'
 Paper presented at the 'Third National Home Care Conference', Kusadasi, Turkey, 12-14 April 2012

Leichsenring, Kai (2012)

**'Trends towards integrated long term care for older people in Europe – Harnessing the knowledge base'** Paper presented at the 12th International Conference on Integrated Care, San Marino, 28-29 March 2012

Leichsenring, Kai (2012)

'Performance measurement in long-term care in Austria'

Paper presented at the 'International Conference on Evidence-based Policy in Long-term Care', London, UK, 5-8 September 2012

Leichsenring, Kai (2012) **'Politiche di welfare e crisi economica: il quadro comunitario'** Paper presented at the regional conference 'Stati generali del welfare Trentino: quali prospettive e cambiamenti possibili?', Autonomous Region Trentino, Trento, Italy, 12 March 2012

Rodrigues, Ricardo / Schmidt, Andrea E. (2012)

**'The impact of cash or services on equitable use of care by older people'** Paper presented at the Annual Meeting of the Austrian Economic Association, May 2012, Vienna, Austria

Rodrigues, Ricardo / Leichsenring, Kai / Schmidt, Andrea E., with Lisa J. Trigg (2012) **'Public reporting of quality in long-term care in Europe: a mapping exercise across six countries'** Paper presented at the International Conference on Evidence-based Policy in Long-term Care, International Long-term Care Policy Network, September 2012, London School of Economics, UK.

#### Schmidt, Andrea E. (2012)

'Kampf der Generationen oder Solidarität zwischen Jung und Alt? Das österreichische Pflegesystem aus europäischer Perspektive' Paper presented at Momentum Kongress, September 2012, Hallstatt, Austria

Schmidt, Andrea E., with Irini Papanicolas and Alistar McGuire (London School of Economics) (2012) **'Hospital quality in Austria'** Paper presented at European Conference on Health Economics, July 2012, Zurich, Switzerland

Schmidt, Andrea E. / Winkelmann, Juliane, with Eszter Kovacs (2012) **'Is the grass always greener on the other side? Mobility of patients, and health and long-term care professionals to and from Eastern European countries'** Various papers presented in an organised session at the International Conference on Challenges for Health and Healthcare in Europe, November 2012, Aalborg, Denmark

Vanhuysse, Pieter, with Markus Tepe (2012)

'The Political Economy of Population Aging and OECD Pension Generosity Retrenchment: The Different Logics and Timing of Small and Large Cutbacks'

Paper presented at the 'Economics of Ageing' conference, Annual Meeting of the Austrian Economic Association, Vienna University of Technology, May 2012

Vanhuysse, Pieter, with Markus Tepe (2012)

'Cops for Hire: The Political Economy of Police Hiring across German Länder'

Paper presented at the Joint Sessions of the European Consortium for Political Research (ECPR), workshop on "Time and Temporality in Politics", Antwerp, Belgium, April 2012

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Hungary	
	Marta Korintus National Institute for Family and Social Policy
Israel	Renée Techelet Ministry of Social Affairs – State of Israel
Italy	(nomination pending)

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Westfalia

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Ministry for Social Security

# Malta

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Rob Bijl The Netherlands Institute for Social Research

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Vesna Piperski Tucakov Ministry of Labour, Employment and Social Policy ||3

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Institute for Labour and Family Research	

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The Board of Directors as of September 2015

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