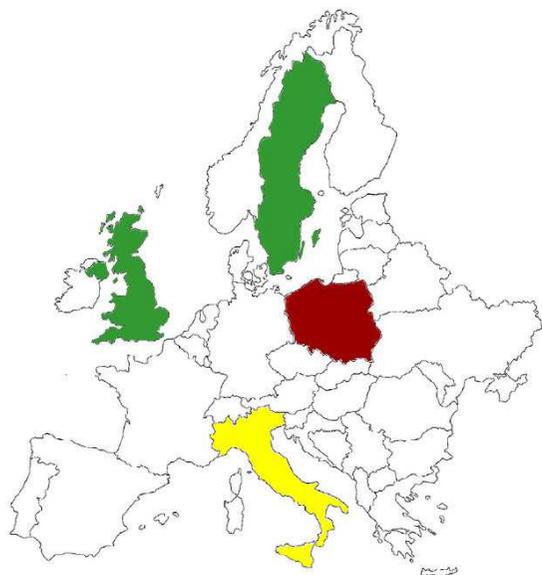


High dependency seniors and Social policies in Italy, United Kingdom, Sweden and Poland

Collaborative housing - mainstream for older people
in the EU?



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Preamble

The short desk research on social policies that gave rise to this comparative report is part of a wide range of activities undertaken by four partner organizations from the United Kingdom, Sweden, Italy and Poland within a Grundtvig Learning Partnership project entitled “Co-Elderly – Co-housing and Social housing for Elders’ Reactivation”.

The idea of ‘Co-EldeRly - Grundtvig Learning Partnership’ is to discuss at the European level the ways, methodologies and practices to “convert” elderly people with low mobility from “care-recipients” also to “care-givers”, moving from a passive situation to being actors of their own life. This opportunity gives them new forms of community living, sharing of common spaces, community decision-making procedures and self-customised services – Co-housing. As a social innovation this has many positive aspects, in relation to its beneficiaries (older people), the State and private companies. We can underline some of them – cutting welfare costs, emancipation and strengthening the decision-making abilities of older people; increasing seniors’ autonomy and giving a new mission, dimension and competences to the social welfare state and private social services providers.

The Grundtvig Learning Partnership, established within the project, has faced the challenge of systematizing knowledge about national policies toward seniors in partner countries about good senior co-housing practice and methods of co-housing management. The main outcomes of partnership work will be a business plan for seniors co-housing; at European level, a universal info-training model for co-housing developers and guidelines for establishing senior co-housing. This report is an initial research enquiry made by the partners with a view to learning more about existing policy towards provisions for seniors and to study the possibilities for creating senior co-housing.

The report brings together essential and interesting information from the national reports compiled by single partners. It is divided in six sections concerning the main areas of interest of the partnership. Hopefully, comparisons of each country’s conditions and essential facts on social policy and existing initiatives in co-housing will inspire us to realise the next step of the project.



Introduction

Social policy for older people should be a system of measures aimed at quality of life, which would comprehensively compensate for the loss, as people get older, of an independent capacity for meeting their own needs, for integrating with the local community and preparing for old age.

Social policy towards older people should be based on three principles:

1. autonomy, designed to preserve the independence of senior citizens in making decisions about their lives at this stage of existence;
2. integration - ensuring older people full participation in society and
3. care or establishing a system of support and assistance for people who, due to age or illness, have lost the ability to meet their needs independently.

Implementation of the above principles draws upon the concept of active aging.

In the following short analysis of national reports, we have tried to extract the most interesting and relevant information in order to understand if the four partner countries’ social policies reflect these principles.

1. Facts on seniors policies

This section is dedicated to a general overview of policies in each partner country. (United Kingdom, Sweden, Italy and Poland). The information provided through national reports concerns the percentage of older people in the population, the retirement age and main trends of national policies toward seniors; welfare interventions for older people and whether specific policies exist for high dependency seniors.

The chart below shows the main considerations relating to the four partner countries.



Country/area	Poland	UK	Italy	Sweden
Retirement	60-65+	65+	65+	65+
Statistical data	17.8% of population	17% of population (2010)	20% of population	18% of population
Demographic changes	By 2030 the number of people 65 + will double	The number of people 65+ will rise to 23% by 2035	Within 50 years (2056) seniors in Italy would represent 32-33% of the population	The number of people 65+ is expected to rise from 18 to 25 per cent in 2060
Social policy directions	policies toward population ageing; - policies toward aged people; - policies toward ageing	-the protection of social benefits -raising the age of retirement -social care	-social care -participation in the labour market -lifelong learning (education)	-assisting older and disabled people to have a normal, independent life (living in their own homes as long as possible) - assisted housing only for those with high levels of need

Partner countries mostly show similar trends regarding the retirement age, which has been set at 65 + but it is gradually rising in the UK. Also forecasts for growth in the numbers of older people are showing similar trends. It can be seen that over the next 40 years the number of older people (65 +) in the above-mentioned countries will exceed 35% of the total population. In addition, social policies in Poland, England, Italy and Sweden are based on welfare toward the older and disabled people, and lifelong learning.



2. Advantages and disadvantages of seniors policies

The second section provides a short analysis of the strengths and weaknesses of national policies toward seniors' active ageing and welfare in the project countries, with specific attention to high dependency seniors. The aim of this analysis is better understanding of main problems faced by seniors in the field of social policy, as well as positive aspects of policy decisions toward elderly people.

The chart below provides a comparison of the main advantages and disadvantages of social policies in the four partner countries.



Country	Advantages	Disadvantages
Poland	- local government support seniors activity centers (Universities of the Third Age, senior clubs, associations, etc.) financially via calls for proposals. This solution ensures better quality of services thanks to the competition factor	- lack of comprehensive offer in geriatric care; - too much pressure and high expectations of families in terms of older and dependent family members' care - insufficient health prevention activities (age limits for health screening), - lack of sufficient legal adjustments in terms of reverse mortgages, - low status of social care operators (negative selection for this profession).
UK	- free health care for everyone - seniors are entitled to free dentistry, eye care and medicine - growing reliance on an infrastructure of care and support provided by non profit organizations - these groups offer informal, community based activities, some of them provide more intensive care and support a move away from reliance on residential care in recent government policy, with an emphasis on older people staying in their own homes where possible (autonomy) - Local Care and Repair agencies help older people adapt their homes in order to stay in them. These services are widespread but under-resourced.	the problem of loneliness among the elderly, - failure of support for people with dementia - unequal budgets / postcode lottery among local authorities responsible for care; growing obligation for seniors to contribute to the cost of care - deteriorating financial support for statutory social care services
Italy	Institutions have been asked to set up a stable Fund addressed to high dependency seniors. The idea is to set up a legal framework which could properly promote seniors autonomy and creativity.	Seniors are still only perceived in terms of need for material assistance (home-care or external residential care). Few local public bodies encourage the real emancipation of seniors
Sweden	The main policy is to help older people and those with disabilities to live normal, independent lives including living in one's own home as long as possible. Older people can obtain various kinds of public support (home care) in their own homes. For economic reasons the amount of support from society is decreasing. Freedom of choice is emphasized and a substantial part of care and assisted living is "for-profit".	Ordinary homes are not adapted to the needs of older people. Many get "trapped" at home. Decreasing public support leads to greater burdens on family members and relatives (mostly women). Municipalities have difficulties in reviewing and monitoring quality in homecare and sheltered housing, when delivered by private for-profit companies.



Some project partners particularly drew attention to the positive fact that social policy in their country is steadily growing. A strong role exists for commercial and non-profit organizations in the care and support policies for seniors (England, Italy), financing activities by local institutions (Poland, Italy) as well as support of more innovative solutions for seniors' housing than traditional seniors' residences.

However, we can also note some negative aspects of seniors policies in partner countries, such as the problem of isolation of the elderly, few governmental initiatives in searching for innovative solutions – plus a number of financial problems.

3. Support of local and national governments to seniors' social housing and co-housing

The aim of this section is to provide information about the commitment of local authorities to the support of initiatives in senior housing and co-housing. Project partners were asked to describe briefly existing forms of housing for older people in their countries and to present basic information about their specificity, as for example recruitment, organization and funding.

Below is a synthesis of information about the main findings, divided by country.

Italy

In Italy the most common form of older people's care with a high degree of dependence is "assistenza residenziale" which includes a number of interventions, procedures and health-social activities provided to high-dependency persons who cannot be assisted at home (Italian Health Minister – 2007) targeting seniors with mobility or (slightly) psychological problems within accredited facilities, on a in-patient treatment basis.

Following this direction, the last debate focused on new forms of housing for seniors with a high degree of dependence. The model of private and community-based housing for seniors is growing in Italy.



UK

90% of older people live in ordinary accommodation; in 70% of cases older people are owners of their homes. Local government, non profit organizations and private companies provide some supported housing services. For roughly 10% of older people, specialist housing (sheltered housing, retirement housing,) for older people can include self contained living accommodation with daily support provided by a member of staff who may or may not live on the premises. The accommodation is usually in blocks of flats and may include communal facilities such as a residents lounge or garden. There is some limited funding for adapting homes to the needs of older and disabled people. There are also planning laws requiring new build housing to meet certain standards of accessibility.

The Government currently does not provide support for senior cohousing, which is very much in its infancy in the UK – as yet there are only self-organized communities.

Sweden

Senior housing in Sweden can be divided into three categories: a) ordinary housing, b) 55 + or senior housing including senior cohousing, and c) sheltered housing. Today 5.0% of the population over 65 years of age live in sheltered housing. To move to sheltered housing requires an assessment and a decision from the local authorities. You have to need comprehensive care. The main policy is that all should live as long as possibly at home.

A new type of housing for the oldest groups, called “Secure housing”, was introduced in 2010. It receives government investment grants from the same funding allocation as sheltered housing. The requirements are to be at least 70 years of age. Individual flats with kitchen, common spaces including a dining room, the possibility to eat together and daily supervision is included, but no care. You can apply for care as in ordinary housing.

Adaptation of housing: For older people who stay in their own homes, there is also the possibility of assistance in adapting their home so that it is easier to live in it. In the planning and construction laws, requirements are set forth for the accessibility and adaptability of housing, so called visitor accessibility. Despite this, it can be difficult for people with impaired functionality to live in either new or older



dwellings. When this happens, in certain cases it is possible to get help with so called housing adaptation, which means that the municipality will adapt the apartment free of charge.

Poland

In Poland there are three kinds of social or private housing possibilities for dependent older people:

- Daily Social Welfare Housing (DDPS), for people who for reasons of age, illness or disability require partial care and assistance to meet the essential needs of life. These daily care houses propose forms of recreation and relaxation, at least one hot meal, and at night people return to their homes;
- Social Welfare Housing (DPS) – housing for following groups:
 - a. elderly people,
 - b. people with chronic, physically ill,
 - c. people with chronically mentally ill,
 - d. adults with intellectual disabilities,
 - e. children and young people with intellectual disabilities,
 - f. people with physical disabilities.
- Currently the care exercised in DPS is very instrumental. Staff treat residents instrumentally, due to the extensive documentation and bureaucracy which takes most of the working day.
- Hospices, addressed to the terminally ill.

There are private housing for older people but the problem is a lack of quality control.

In partner countries, there exist individual forms of housing assistance for seniors adapted to cultural, social and legal conditions. In Italy, there is a so-called. "assistenza residenziale", in England with seniors housing adaptation to their individual needs, Sweden - flats for seniors, sheltered housing, housing and ordinary housing for people 55 +, while in Poland there are three housing solutions provided by local governments, as well as private care facilities provided by companies.



4. Existing reports and researches on active ageing and future challenges for seniors' policies

The aim of this section is to collect the most relevant research, reports and publications, available in project partners' national languages, which are focused on the theme of active ageing and seniors' present problems seen in the light of future challenges. The bibliography gives an opportunity to explore further deepening trends in social policies toward seniors and aspire to possible solutions in view of demographic changes.

Below is a list of the most interesting researches.

Italy

1. Elisabetta Risi - Imparare qualcosa di nuovo. La mappa delle opportunità di apprendimento per gli anziani all'uso delle nuove tecnologie: this book gives an interesting overview of any kind of learning opportunity for seniors within the ITC world, mapping the current good practices into this field in Italy.
2. Evaluating active ageing policies in Italy: an innovative methodological framework - VP/2008/006/14: http://www.eesitaly.org/sites/default/files/4_Final_Report.pdf: based on a EU funded project, this text maps and evaluate Italian public policies for seniors.
3. Francesco Cocco e Raimondo Pibiri - Residenze sociali con servizi per anziani. Il modello della "vivienda dotacional" del Comune di Barcelona www.espanet-italia.net/conferenza2011/edocs2/sess.6/6-cocco-pibiri.pdf: this text offers a framework for developing new forms for collaborative housing for seniors even with high dependency. It analyses the Barcelona model called "vivienda dotacional"
4. <http://www.secondowelfare.it/primo-welfare/politiche-per-la-non-autosufficienza-in-italia.html>: this text is mainly based on the analysis of policies for high dependency seniors in Italy.
5. http://www.politichefamiglia.it/media/74643/report_ii_parte_famiglie_con_anziani.pdf: this research provides data, good practices and analysis of family and welfare policies on the Italian territory aimed at seniors integration and emancipation.

UK

1. http://www.ageuk.org.uk/Documents/EN-GB/Factsheets/Later_Life_UK_factsheet.pdf?dtrk=true - fact sheet giving quantitative information about the situation of older people in the UK today



2. www.ageuk.org.uk/Documents/EN-GB/For-professionals/Policy/agenda_for_later_life_report_2013.pdf?dtrk=true - an annual policy review looking at policy issues for older people and advocating how they might be improved
3. <http://www.publications.parliament.uk/pa/ld201213/ldselect/ldpublic/140/14002.htm> - a report looking at the implications of the changing characteristics of the older population for policy on ageing (Report called "Ready for Ageing?")
4. <http://www.jrf.org.uk/work/ageing-society> - ongoing programme of research into ageing of the Joseph Rowntree Foundation
5. <http://www.jrf.org.uk/work/ageing-society>, <http://www.jrf.org.uk/sites/files/jrf/senior-cohousing-communities-full.pdf> - an examination of the potential for senior cohousing following an event organised by the UK Cohousing Network

Sweden

1. Blomberg, Ingela & Kärnekull, Kerstin, Bygga seniorboende tillsammans – en handbok, Svensk Byggtjänst, 2013
2. Holm Bodin, Johanna, Femti funderingar om äldres boende, Sveriges kommuner och landsting, Stockholm, 2012
3. Kärnekull, Kerstin, Bygga för seniorer, Svensk Byggtjänst, 2011.
4. Svensson, Elisabet, Bygg ikapp: för ökad tillgänglighet och användbarhet för personer med funktionsnedsättning, 5. utg., Svensk byggtjänst, Stockholm, 2012 Sverige.
5. Sverige. Äldreboendedelegationen, *Bo bra hela livet: slutbetänkande*, Fritzes, Stockholm, 2008
6. Sverige. Äldreboendedelegationen, *Bo för att leva: seniorbostäder och trygghetsbostäder: delbetänkande*, Fritzes, Stockholm, 2007
7. Martha Szebelehy, Martha och Ulmanen, Petra, *Ålderstramningens pris. Hur påverkas de medellålders barnen av äldreomsorgens minskning? Rapport för Kommunal 2012.*
8. Wiklund, Gabriella & Melin, Stefan (red.), *Bo bra på äldre dar: [kunskap, kreativitet, kvalitet]*, Svensk Byggtjänst, Stockholm, 2013

Poland

1. PolSenior: „Aspekty medyczne, psychologiczne, socjologiczne i ekonomiczne starzenia się ludzi w Polsce” pod red. M. Mossakowskiej, A. Więcka, P. Błędowski, Poznań 2012 – a research project concerning the medical, psychological, sociologic and economic aspects of



ageing In Poland

2. red. B. Szatur-Jaworska, „Strategie działania w starzejącym się społeczeństwie. Tezy i rekomendacje”, Warszawa 2012 – a publication containing guidelines for social Policy toward seniors in Poland

5. Support of seniors' education

The fifth section of the national reports concerns supporting the educational development of seniors (lifelong learning) - examples of good practices in project countries (some institutions, associations, foundations, local support, national projects, etc.) with specific attention to high dependency seniors. This information provides a general overview of the educational environment of older people and various activities over and above strict health care.

Below is a synthesis of information about the main findings, divided by country.

Italy

Italian legislation includes adult education in an integrated system of education, of which the main tools are:

- Centres for lifelong learning. These centres may issue a diploma (formal education) or work in an informal way;
- Educational activities in the workplace or delivered in social enterprises (non-formal education).

Italian law (L. 328/2000) for an integrated system of social interventions and services indicates the need for social integration of services with other policy areas such as education and training (VET).

We can see a focus on policy implementation for professional reactivation.

UK

Local authority adult education colleges – open to all but increasingly funding for courses is focused on those which increase learners' employability. Nevertheless, most local authorities continue to offer a programme of daytime and evening courses in a range of subjects from languages, IT skills and local history to physical activities and speciality cooking. Most students pay fees but older people are usually entitled to



a concessionary rate.

NGOs. A range of local voluntary and community organisations provide learning opportunities. Many AgeUK branches run courses particularly in issues such as IT skills.

University of the Third Age – is an organisation set up for older people to provide informal learning opportunities to other older people. It now offers tutored and untutored online courses. <http://www.u3a.org.uk/>

WEA – another independent charity, providing a wide range of courses for adults. Courses are focused on community involvement, cultural studies and second chance to learn <http://www.wea.org.uk/>

Open University – an organisation providing distance learning for anyone at university and lower levels in a very wide range of subjects. <http://www.open.ac.uk>

Learning opportunities for older people with high dependency needs are more limited. Some NGOs have done work in this area. For example, the Alzheimers Disaese Society has set up a number of choirs across the country which bring people with dementia and their carers together to sing. These have been very successful. Other charities run reminiscence sessions with people in this group. Arts provision generally is reasonably common in settings working with older people with high dependency. There is evidence that continuing learning reduces the risk of dementia.

Sweden

Swedish popular education (folkbildning) is the collective name for the activities conducted by the country's folk high schools and study associations in the form of courses, study circles and cultural activities. These activities include a rich offering of courses and educational programmes – everything from study circles where a small group meets a few times in their leisure time, up to multi-year, full-time courses of study at folk high schools. Folkbildning is a part of the liberal non-formal education system. Every year, several million Swedes get involved in folkbildning activities. Folkbildning is open to everyone in society. In folkbildning, everyone participates on equal terms, but based on different conditions. People seek knowledge and development through folkbildning for various reasons. According to Statistics Sweden's information the proportion of circle participants who are 65 years of age or older is significantly larger than this group's share of Sweden's population – 33 per cent compared with 18 per cent of the population.



A recent study has shown that increase in educational level counteracts expected severe ill-health as a result of an ageing population. This could also be an argument for seniors' education in general.

Poland

In Poland adult education is provided by:

- Third Age Universities – with the aim to give educational opportunities to people who could not get it in the past (low-educated people), to conduct gerontological research, to improve the quality of life of older people through health and intellectual activities and artistic expression, and also to disseminate knowledge about ageing among political decision-makers. First TAU in Poland was born in 1975 in Warsaw.
- Seniors' Clubs – support groups in residential areas for people with low mobility. These Clubs are led by social leaders commissioned and funded by local authorities. Activities include health prevention, common meetings, trips, free time activities.
- Seniors' Councils – commissioned by local authorities. Education is the main priority of their activities.
- non-profit organizations – there is a wide range of educational activities for over 55s provided by organizations. Usually they are implemented within single projects funded by different public sources, recently by the Program of Social Reactivation of Older People (Ministry of Work and Welfare).

Both England and Poland have actively functioning Universities of the Third Age. Also in Italy, England and Sweden there are learning centers offering a range of training and courses for seniors.

6. Dissemination of senior co-housing idea

The last section of national reports provides information about the popularization of the idea of co-housing in partner countries and some examples of its dissemination (for ex. promotional events, particular policies, advertisement) and its context (projects, policies, private companies investments).

'A Cohousing Community' may be defined as a setting where individuals actively



choose to live together as part of a group dedicated to managing their immediate environment co-operatively, taking decisions together and sharing common meals and activities. Each individual or family has their own, separate living space but shares a range of common facilities within the group.

Its main characteristics (Fromm, 1991) are:

- Common facilities
- Private dwellings
- Resident-structured routines
- Resident management
- Design for social contact
- Resident participation in the development process

The aim is to understand better how far the idea of cohousing communities is recognised in society, how it is perceived and if some of the groups involved or other interested actors organize promotional events, especially in the context of demographic change.

Below is a synthesis of information about the main findings, divided by country.

Italy

Italy has some experience in co-housing, especially in the North. We can find some examples on www.cohousing.it and www.coabitare.org. Both organizations are highly qualified, the first is more "technical", the second oriented to volunteering.

The case of social housing of Fondazione Social Housing (www.fhs.it) deals with project financing and mediating for social housing settlements through social housing developments. FHS has considerable expertise in the social housing economy and a large archive of research and development in the field of innovation.

Here we mention 2 ongoing Italian practices/projects which try to combine residential care for seniors with high dependency together with collaborative housing approach:

- a) Cagliari – Centro Jenner http://www.mapconsulenze.it/centro_jenner/?page_id=57
- b) Progetto "Abitare Leggero": Fondazione Housing Sociale and Società Cooperativa



Sociale La Meridiana, funded by Fondazione Cariplo.

UK

The cohousing concept was introduced in Great Britain about 15 years ago. There are currently 13 groups seeking to create seniors cohousing. Cohousing initiatives are now supported by the UK Cohousing Network, a small independent body dedicated to promotion and support for new cohousing communities. The Network is currently funded by the Tudor Trust, a charitable foundation and does not receive governmental funding.

However, cohousing is slowly gathering interest among both policy makers and the public. There are now regular items in TV and radio and printed media with a focus on cohousing, architects are getting interested in the concept and cohousing is increasingly a subject for post-graduate research.

Sweden

Dissemination of the cohousing idea is carried out more or less through every cohousing project itself. However, the national network Kollektivhus NU supports dissemination and promotes contacts between existing communities. Most of the communities have an Open House weekend every year in the beginning of October when usually many people visit the house and ask questions. Kollektivhus NU arranges seminars and makes current research available to members. Most of the dissemination is carried out by the inhabitants in the single cohousing project through receiving visitors for dinner or taking care of study groups, and when visitors find the idea quite tasteful and appealing they spread the idea further.

In Stockholm, Gothenburg and Karlskrona, local associations are engaged in promoting new co-housing and senior housing projects (Föreningen Framtiden, Bolhop, Karlskrona Seniorhusförening).

A few municipalities promote the idea of senior co-housing or bogenemskaper, among them Gothenburg and Karlskrona. Some also encourage Baugruppen (groups of people that act as a client together, trying to realize their own ideas about housing and living through commissioning developers).



Poland

The idea of co-housing in Poland is in generally not known. Only in a monograph entitled "Strategies for action in an aging society. Theses and recommendations", edited by B. Shatura-Jaworska, Warsaw 2012, is there mention of such a solution. In the chapter "Housing and living environment old people " by Mary Zralek, co-housing is suggested as a good practice occurring in developed countries. The European concept, the term co-housing or cohousing in Poland can be explained as an intentional community (see above, p.10) that means something completely different than in the Co-housing and social housing for Elders Reactivation project. Residential communities in Poland are constituted by a group of people, who from the very beginning participate in planning of residences with aim to set up communities, or better, group of houses constructed with the budget lower than commercial.

Current popularization of the idea of co-housing for older people has led to growing interest among some institutions and companies. In June 2013 the Municipality of Cracow, in partnership with European Institute of Real Estate, with the participation of guests presenting experiences from Italy, UK, Austria, Switzerland and Slovenia, has organized a conference addressing the urgent problems of demographic change and the lack of appropriate accommodations for older people in Poland. This is the first public debate on this issue organized across such a wide range and, hopefully, will follow concrete initiatives in terms of co-housing.

Conclusions and recommendations

On 16 December 1991, before demographic changes began to accelerate, the United Nations General Assembly adopted the Principles of Operation for Older People (resolution 46/91) and recommended that governments take into account national action plans for seniors. The document has 18 recommendations on the rights of older people. These recommendations are assigned to five basic principles: independence, participation, care, self-fulfillment and dignity.

Over 20 years later, in 2012, the European Commission established this year as the European Year for Active Ageing and Solidarity Between Generations. Its aim was to draw to the attention of society, politicians, individuals and other interested entities, the contribution of older people to society. It encouraged older people to make a concrete contribution to society and to create conditions conducive to active ageing and strengthening the solidarity between generations.



Active ageing consists of many elements: ageing with good health, active participation in social life, fulfillment in life and more independence in everyday life. Regardless of their age, older people can play an important role in society and enjoy life. It is important for social policy to propose ways to maximize their potential. In 2012, the European Union has supported active ageing through actions in three areas: employment - providing more opportunities for older people in the labour market; participation in social life - the active participation of older people in society, overturning passive images of this stage of life; independent living - improving the functioning of older people, so that they can live an independent life as long as possible.

It is important that social policy does in fact implement the concept of active ageing and focuses on the following actions:

- to include older people in the education system of lifelong learning (LLL), regardless of age, gender, education, place of residence, economic conditions,
- to change the image of old age, to fight against negative stereotypes of old age,
- to switch gerontology into research (research area, participative research),
- to accustom older people to new technologies,
- to include older people in the labour market;
- to prepare a community of leaders,
- to promote voluntary service among seniors
- to switch to local educational projects, cultural or social,
- to undertake intergenerational cooperation
- to promote preventive gerontology,
- to ensure an appropriate infrastructure for long-term care

This list is not exhaustive, and the particular challenges are not mutually exclusive, but overlap.

We are bio-psycho-social beings, which means that in social policy a holistic approach is important, taking into consideration the condition of the older person from three perspectives: psychological, biological and social. Only this approach – concerning all dimensions of ageing – will be favorable to optimal ageing. The analysis of social policies of four partner countries shows that the important needs of



older people must be recognized. These are autonomy (independence), to be in contact with other people and to be useful.



National policies toward seniors - Country Reports

Italy



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1. Facts on seniors policies

The term "seniors" can easily match with the Italian word "anziani". According Italian law "anziani" are +65 old people, usually already or close to the retirement period. The demographic ageing process is expected to produce dramatic changes in the size and structure of the European population, particularly affecting its labour force. The proportion of aging classes is growing in each EU Member State and especially in Italy.

In Italy over 65 class reaches about 20 % of the whole population. So far, Italy is the oldest country in Europe after Germany. It has been estimated that within 50 years (2056) seniors in Italy would represent 32-33% of the population (<http://www.istat.it/it/archivio/48875>).

This scenario is mainly due to a combination of different trends: the drastic drop in the birth rates after the 50s and the 60s (the crude birth rate in Italy was 9.623% in 2008, compared to the EU27 average of 10.869%), low fertility rates (1.53 births/woman on EU27 average and 1.35 in Italy in 2006, are below the replacement rate of 2.1 needed to maintain the current population, disregarding migration contribution) and increasing life expectancy at birth for both males and females (respectively 78.50 and 84.20 years in Italy in 2006, always above the EU27 and OECD averages;

Concerning social policies in Italy it is evident the no-homogeneous distribution of main services to families (like kinder gardens) or assistance to disabled peoples and high dependency seniors within the Italian territory, nonetheless cohesion policies and social interventions for re-balance. Even National Health System performances differ on the North-South axis. The same for water management services, public



transport, bureaucracy.

The Italian law n. 381 issued in 1991 includes seniors (in particular with high dependency issues) among the list of disadvantaged people which can be target for social cooperation policies.

Consistently with the European trend, Italian policy initiatives in the active ageing domain consist primarily of welfare regulation reforms aimed at extending working life combined with few labour market measures indirectly targeting mature workers. More in detail, active ageing policies in Italy have involved three policy domains in particular: the welfare system, labour market participation, and lifelong learning and continuous training.

Sources:

- Evaluating active ageing policies in Italy: an innovative methodological framework – VP/2008/006/14 - http://www.ees-italy.org/sites/default/files/4_Final_Report.pdf
- <http://www.istat.it/it/archivio/48875>
- (a cura di) Cristiano Gori - Il sistema di protezione e cura delle persone non autosufficienti. Prospettive, risorse e gradualità degli interventi – available at www.lavoro.gov.it

2. Advantages and disadvantages of seniors policies

According to many NGOs active into the field of seniors reactivation/assistance, seniors with high dependency are one of the biggest crises to be faced by the Italian Country. Institutions have been asked to set up a stable Fund addressed to high dependency seniors. The idea is to set up a legal framework which could properly exploit seniors autonomy and creativity. Also seniors volunteering for persons' help and common goods safeguard is highly meaningful for guaranteeing social peace in Italy even in crisis period like that. (http://www1.auser.it/IT/Tool/Press/Single/view_html?id_press=136)

In march 2013 the National Programme “Services for childhood and high dependency seniors” began and followed with the funds distribution of 730 millions of euro among 4 Southern Regions (among those Campania, where Consorzio ASIS is based).

http://www.salute.gov.it/portale/news/p3_2_1_1_1.jsp?lingua=italiano&menu=notizie&p=dalministero&id=990



3. Support of local and national governments to seniors' social housing and co-housing

In Italy, the most used form of assistance for high dependency seniors is the „assistenza residenziale“ which includes a <<number of interventions, procedures and health-social activities provided to high-dependency persons which cannot be assisted at their own home>> (Italian Health Minister – 2007) targeting seniors with mobility or (slightly) psychological problems.

In the last years many changes concerned organization and diversification of seniors assistance within the Italian welfare system: <<while in the past seniors – being or not autonomous – were hosted in the same structures (disregarding their differences), today assistance is provided according to the intensity of provided assistance>>.

It can be said that, nowadays, high dependency residential assistance for seniors in Italy proves the existence of a solid synergy among welfare actors. Needs are read according to a „proximity“ approach, where you detect resources as much as possible next to the final beneficiary, within the hosting community. Seniors' relatives are asked to serve the final aim of the highest emancipation (and feeling of acceptance by the Community) of beneficiary.

Following this direction, in the last years debate has been focused on new forms for residential setting for seniors with high dependency. The U.S.A./Northern Europe model of Community residences with private and shared spaces for seniors is growing in Italy, too, under medium and long-term experiences. It can be said that it is still a “liquid” area because it is not still clear if familiar-oriented residential approach can – at the same time – guarantee good results in terms of quality and effectiveness of care provided. The most recent trends in the sector suggest for elderly a more wide diffusion on the territory of housing models based on usual house, even if enriched by a system of physical, technological and social extra services, able to support the conditions of greater frailty typical of later life. Diversified intervention typologies are today available in Italy too, thanks to several experiences carried out by public institutions, housing cooperatives and other social organizations (solutions in property or rent, with or without services, only for elderly or mixed, with or without smart systems, in the centre or in the suburbs, etc.).

Sources:

- (a cura di) Cristiano Gori - Il sistema di protezione e cura delle persone non autosufficienti. Prospettive, risorse e gradualità degli interventi – available at www.lavoro.gov.it



- <http://www.lombardiasociale.it/2012/12/19/le-soluzioni-abitative-per-anziani-alternative-alla-residenzialita-pratiche-internazionali-e-sperimentazioni-italiane/>
- Famiglie con anziani non autosufficienti - a cura di Donatella Bramanti - http://www.politichefamiglia.it/media/74643/report_ii_parte_famiglie_con_anziani.pdf
- D'Innocenzo – Abitare integrato n. 2. 2011 <http://www.abitareanziani.it/aea/RIVISTA/AeA/Inumeri.aspx?PageContentID=104>

4. Existing reports and researches on active ageing and future challenges for seniors' policies

Here the list of the main researches, reports, documents on active aging and seniors policies in Italy:

- Elisabetta Risi - Imparare qualcosa di nuovo. La mappa delle opportunità di apprendimento per gli anziani all'uso delle nuove tecnologie: this book gives an interesting overview of any kind of learning opportunity for seniors within the ITC world, mapping the current good practices into this field in Italy.
- Evaluating active ageing policies in Italy: an innovative methodological framework - VP/2008/006/14:
- http://www.eesitaly.org/sites/default/files/4_Final_Report.pdf: based on a EU funded project, this text maps and evaluate Italian public policies for seniors.
- Francesco Cocco e Raimondo Pibiri - Residenze sociali con servizi per anziani. Il modello della "vivienda dotacional" del Comune di Barcelona www.espanet-italia.net/conferenza2011/edocs2/sess.6/6-cocco-pibiri.pdf: this text offers a framework for developing new forms for collaborative housing for seniors even with high dependency. It analyses the Barcelona model called "vivienda dotacional"
- <http://www.secondowelfare.it/primo-welfare/politiche-per-la-non-autosufficienza-in-italia.html>: this text is mainly based on the analysis of policies for high dependency seniors in Italy.
- http://www.politichefamiglia.it/media/74643/report_ii_parte_famiglie_con_anziani.pdf: this research provides data, good



practices and analysis of family and welfare policies on the Italian territory aimed at seniors integration and emancipation.

5. Support for seniors' education

Social policies addressing the active aging are focused on a new concept of "activity" in a twofold direction. On one hand, it must be remarked that senior population is able to maintain a good level of activity, due to biological and socio-cultural features. On the other hand, keeping high levels of active life is meaningful for a happy aging.

The high quality (and quantity) of activity for seniors is evident even in lifelong learning. The Italian legislation promotes adult education as an integrated learning system, whose main tools are:

- centri di formazione permanente (CTP) – Centres for lifelong learning. These centres can issue diploma (formal education) or operate under an informal approach;
- Learning activities held at job places or provided within social enterprises (informal education).

The Italian law (l. 328/2000) for integrated system for social interventions and services reveals the need for integration of social interventions/services with other policies like vocational education and training (VET).

It must be remarked, then, the Agreement (2000, 2nd of March) among Government, Regions, provinces, Municipalities and mountain communities for the re-organizational empowerment of adult lifelong learning, where a pillar aim has been given to adult education to push up seniors activation and re-activation.

Sources:

- http://www.espanet-italia.net/conferenza2008/paper_edocs/A/3%20-%20Risi.pdf
- www.archivio.pubblica.istruzione.it/dg_postsecondaria/allegati/acc020300.pdf

6. Dissemination of seniors' co-housing idea

Concerning Co-housing in Italy there are some experiences of Co-housing Communities, mainly in the North. You can find some on www.cohousing.it and www.coabitare.org. Both actors have high qualified experience, the former being



more “technical” (under a for profit approach), the latter related to volunteering and associationism.

Concerning social housing the Fondazione Social Housing (www.fhs.it) is dealing with projects, funding and intermediation for social housing settlements. FHS has a high expertise in social housing management and a big archive with researches, studies and development of innovation area.

According to the idea of Co-elderly to be focused on collaborative housing models, as written above, the idea of making life more interesting and active for seniors through their direct involvement into the residential houses management and care proved to be as innovative as highly effective. Even partial-quasi collaborative housing experiences gave good results, in terms of activism, relational approaches, knowledge improvement

Here listed 2 ongoing Italian practices/projects which try to combine residential care for seniors with high dependency together with collaborative housing approach:

- Cagliari – Centro Jenner http://www.mapconsulenze.it/centro_jenner/?page_id=57
- Progetto “Abitare Leggero”: Fondazione Housing Sociale and Societf Cooperativa Sociale La Meridiana, funded by Fondazione Cariplo.

Sources:

- http://www.politichefamiglia.it/media/74643/report_ii_parte_famiglie_con_anziani.pdf

National policies toward seniors - Country Report United Kingdom



Document Details:

Reference: MELANIE NOCK/MARIA BRENTON

Activity: WORK PROGRAMME NR 2

Author(s): MELANIE NOCK/MARIA BRENTON

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1. Facts on Seniors Policies

Currently in the UK, the age at which men may draw their state pension is 65 (women may draw theirs at 60). The Government has introduced a programme to equalise the ages at which men and women draw their pension and gradually to extend the age so that people born in 1978 or later will be able to receive their pension at the age of 68. For now, 65 is usually used as the point at which people are deemed to become "seniors."

The 2011 census in the UK showed that there are 9.2 million people aged 65 or older, 16.4% of the total population of the UK. 1.4 million people are aged 85 or older and over 12000 are aged 100 or more. Although across the UK's total population, 16% are from Black and minority ethnic communities, only 8% of the population over 60 are from these groups.

The number of people aged over 65 is expected to rise by over 50% in the next 20 years, while the number of people aged over 85 is expected to triple in the next 30 years with one in five of the people currently alive in the UK living to be 100.

The main thrust of national policy towards older people is currently;

- To protect social security benefits received by older people from the austerity cuts which are being applied to benefits received by younger people (eg unemployment benefit, child benefit, incapacity benefit). This includes the free bus passes available to all older people, special payments to cover winter heating



costs and free TV licences for people over 75. However, it is not clear whether this protection will continue after the next general election due in 2015. In addition, the Government is now introducing legislation to keep the retirement age under constant review in the light of increasing life expectancy

- To encourage older people to stay in work even after they are entitled to receive their state pension. (Between August and October 2012, there were 959,000 people aged 65 and over in work)
- To address the escalating costs of care. As more of the population has become older and as local authority budgets have come under greater pressure, so more people are expected to meet the costs of their own care (whether the care is provided to them in their own homes or in a residential care home). The Government has introduced legislation to put a maximum amount on the cost of non medical care. It will also give everyone who has their care paid for or partly paid for the right to receive that help as a direct payment to them rather than to be given access to services provided by the local council. And it will introduce a new system of inspecting care homes.

2. Advantages and disadvantages of senior policies

Inevitably, a subjective question, current strengths of the UK approach to policies for older people include;

- All health care is free at the point of use for everyone. Older people do not have to worry about paying for their health care. People of pensionable age are entitled to free dentistry, eye care and medicine.
- There is a considerable infrastructure of care and support provided by NGOs. These groups offer informal, community based activities. Some also provide more intensive care and support. Older people themselves have access to a wide range of volunteering opportunities.
- There has been a move away from reliance on residential care in recent government policy, with an emphasis on older people staying in their own homes where possible.

The disadvantages include;



- 70% of women and 34% of men aged over 70 live alone. The Government is doing very little to address the growing problem of loneliness amongst older people. 7% of those aged over 65 say they often feel lonely. Half consider the television to be their main source of company.
- Local authorities (local councils) are responsible for care which is not health care and older people have to contribute to the costs of this care. Local authority budgets are under increasing pressure; the distribution of older people is very unequal, resulting in some authorities having very much larger populations of older people to care for; this arrangement means that people do not receive equal access to care.
- Support for older people with dementia is not keeping pace with the growing numbers of people with this condition.

3. Support from local and national Government for senior social and co-housing

90% of older people live in ordinary accommodation and 70% own their own homes. Specialist forms of housing (supported housing) exist for older people provided by local government, NGOs and private organisations. Where people of more limited means access rented housing provided by any organisation, they are entitled to housing benefit – a rent subsidy – provided by the Government.

Supported housing for older people usually comprises self contained living accommodation with support provided by a member of staff who may or may not live on the premises. The accommodation is usually in blocks of flats and may include communal facilities such as a residents lounge or garden. A small number of these developments also provide care.

About 5% of the older population live in supported housing and the UK has around 550,000 units of such housing, mainly social rented but also for sale. Eligibility criteria for accessing such housing varies from scheme to scheme. Over a quarter of existing residents are over 85, and more than half have disabilities and health conditions. Many of these residents probably have care packages. But there is also a growing number of residents at the younger end of the age range, who are likely to have moved there for reasons related to homelessness. Qualitative evidence suggests that sheltered housing can promote self-determination, safety/security, privacy to conduct personal relationships (especially for couples) and opportunities for wider social interaction.



The Government currently provides no support for senior cohousing which is very much in its infancy in the UK – as yet there are no established senior cohousing communities. Developing senior cohousing groups may be able to take advantage of other government policies to stimulate house building. A very small number of Housing Associations (social landlords) have taken an interest in cohousing generally and only one specifically in senior cohousing.

4. Existing reports and researches on active ageing and future challenges for seniors' policies

There is a plethora of such reports.

AgeUK, a leading NGO advocating for and providing services to older people has produced a comprehensive fact sheet giving quantitative information about the situation of older people in the UK today

http://www.ageuk.org.uk/Documents/EN-GB/Factsheets/Later_Life_UK_factsheet.pdf?dtrk=true

The same organisation also produces an annual policy review looking at policy issues for older people and advocating how they might be improved

www.ageuk.org.uk/Documents/EN-GB/For-professionals/Policy/agenda_for_later_life_report_2013.pdf?dtrk=true

In March 2013, the House of Lords (the parliamentary upper house) select committee on Public Service and Demographics published a report looking at the implications of the changing characteristics of the older population for policy on ageing (Report called "Ready for Ageing?"). <http://www.publications.parliament.uk/pa/ld201213/ldselect/ldpublic/140/14002.htm>

The Joseph Rowntree Foundation, a charitable trust which funds research as well as providing housing and care, has an ongoing programme of research into ageing. Specific aspects of this work include

- Looking at what most helps older people with high dependency needs with particular emphasis on housing and care and including looking at approaches which are not widely available
- How neighbourhoods can contribute to the wellbeing of older people at risk of being lonely



- Helping people with dementia to live well

<http://www.jrf.org.uk/work/ageing-society>

JRF included in that strand of its work, an examination of the potential for senior cohousing following an event organised by the UK Cohousing Network. Maria Brenton wrote the paper.

<http://www.jrf.org.uk/sites/files/jrf/senior-cohousing-communities-full.pdf>

5. Support for seniors education

Lifelong learning opportunities are provided through

- Local authority adult education colleges – open to all but increasingly funding for courses is focused on courses which increase learners' employability. Nevertheless, most local authorities continue to offer a programme of daytime and evening courses in a range of subjects from languages, IT skills and local history to physical activities and speciality cooking. Most students pay fees but older people are usually entitled to a concessionary rate.
- NGOs. A range of local voluntary and community organisations provide learning opportunities. Many AgeUK branches run courses particularly in issues such as IT skills.
- University of the Third Age – is an organisation set up for older people to provide informal learning opportunities to other older people. It now offers tutored and untutored online courses. <http://www.u3a.org.uk/>
- WEA – another independent charity, providing a wide range of courses for adults. Courses are focused on community involvement, cultural studies and second chance to learn <http://www.wea.org.uk/>
- Open University – an organisation providing distance learning for anyone at university and lower levels in a very wide range of subjects. <http://www.open.ac.uk>

Learning opportunities for older people with high dependency needs are more limited. Some NGOs have done work in this area. For example, the Alzheimers Disaese Society has set up a number of choirs across the country which bring people with dementia and their carers together to sing. These have been very successful. Other charities run reminiscence sessions with people in this group. Arts provision



generally is reasonably common in settings working with older people with high dependency. There is evidence that continuing learning reduces the risk of dementia.

6. Dissemination of senior cohousing idea

The concept of cohousing has been discussed in the UK for around 15 years. It remains a very small field with only some 14 established inter generational communities and no established senior communities in the UK. There are 12 forming groups specifically seeking to set up senior cohousing. It is now supported by the UK Cohousing Network, an independent body devoted to promoting cohousing and supporting new communities. The network is currently funded by the Tudor Trust, a charitable Foundation. It receives no government funding.

However, both cohousing generally and senior cohousing specifically are becoming of much greater interest to both policy makers and the public. There are now regular items in both broadcast and print media discussing cohousing in serious terms.



National policies toward seniors - Country Report

Poland



Document Details:

Reference: MARIAN FERENC

Activity: WORK PROGRAMME NR 2

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Character :PARTNER 3 POLAND, Fundacja Aktywny Senior – Country Report

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1. Facts on seniors policies

In Poland the age in which usually people are considered seniors is 60-65 (Szatur – Jaworska, 2012; Mossakowska, Więcek, Błędowski, 2012). Nowadays the percentage of the population over 65 is about 15% and growing trend foresee that in 2035 this percentage will rise up to 23,2% (Mossakowska, Więcek, Błędowski, 2012).

In Poland we can identify three related aspects:

- Policies toward population ageing – concerns demographic ageing and the grow of people over 65 percentage in the whole population. This process has several reasons and different consequences. The actions included in this kind of policies concerns different particular policies, for example economic policy, urban and social area formation, migration policy, etc.
- Policies toward aged people (seniors) – concerns the interests and needs of concrete group of population living in defined area. This policy include the recognition of the situation of actual seniors and forecasting of aged people needs.
- Policies toward ageing – education toward ageing. The addressees of this policy are not only aged people, but also younger generations. The aim is the preparation of whole population for the meeting with old age and for living in the society open for all age groups. The intention is to ensure the equal position to all life phases and to form the positive image of ageing in the society (Szatur – Jaworska, 2012).

In 2002 Poland has signed the Madrid Agreement (within Madrid International Plan of Action on Ageing), which has obligated the country to establish The Ministry or Department

of Elderly People, but till 2013 the social policy for aged people was dispersed in different Ministries (especially in Ministry of Health). After 11 years the Department of Social Policy in Ministry of Work and Social Policy has been set up.

In 2012 the Bureau of Citizens Rights has edited important publication “**The Strategies of Actions in Ageing Society – Thesis and Recommendations**” <http://www.rpo.gov.pl/pliki/13541772380.pdf>. This publication indicates 12 areas of proposed directions for social policy (including housing and urban areas planning for seniors) and activities that should be implemented in the system of social care and support for elderly people.

Currently is discussed, by the Council for Elderly People’s Policy, the project of the Act of Support for Dependent Persons. In Poland the percentage of dependent people is about 4% of whole society and main barriers for appropriate care which could be provided to this group are:

- the lack of complex activities;
- poor care offer;
- high number of “black economy” operators in social care sector.

The purpose of this Act is to introduce and adjust issues concerning:

- definition of “dependency” and criteria
- the control of quality of social care
- sources and conditions of social care financing.

This Act will bring benefits, which we can assume as: more work places for care operators (aprox. 200 000), new work opportunities for people over 60 and development of “white economy” in this sector.

2. Advantages and disadvantages of seniors policies

Advantages:

- 600 mln PLN for development of policies toward ageing in 2012-2013. With this purpose there was established the Governmental Program for Elderly People Activities http://www.mpips.gov.pl/gfx/mpips/userfiles/_public/1_NOWA%20STRONA/Aktualnosci/seniorzy/Rzadowy%20Program%20ASOS_2012-2013.pdf. Within this program the local projects are financed by calls for proposals in following areas: elderly people education, activity in social life, development of care services, intergenerational integration, voluntary service for seniors, etc.).



- local governments are allowed to transfer certain part of own budget to centers for elderly people (for Universities of Third Age, Seniors’ Clubs, associations, etc.).

Disadvantages:

- lack of rich offer in geriatric care;
- too big pressure and expectations of families in terms of elderly and dependent family members’ care
- insufficient health prevention activities (age limits for medical analysis),
- lack of sufficient law adjustments in terms of reverse mortgage,
- low status of social care operators (negative selection for this profession).

3. Support of local and national governments to seniors’ social housing and co-housing

In Poland there are three kinds of social or private housing possibilities for dependent elderly people:

1. Daily Social Welfare Departments (DDPS), for people who for reasons of age, illness or disability require partial care and assistance to meet the essential needs of life. These daily care houses propose forms of recreation and relaxation, at least one hot meal, and at night people return to their homes;
2. Departments of Social Welfare (DPS) – housing for following groups:
 - a. elderly people,
 - b. people with chronic, physically ill,
 - c. people with chronically mentally ill,
 - d. adults with intellectual disabilities,
 - e. children and young people with intellectual disabilities,
 - f. people with physical disabilities.

Currently the care exercised in DPS is very instrumental. Staff treat residents instrumentally, due to the extensive documentation and bureaucracy which



takes most part of working day .

3. Hospices, addressed to the terminally ill.

There's still a need of new private pensions for the elderly but the quality control is needed.

4. Existing reports and researches on active ageing and future challenges for seniors' policies

The most recent report which constitutes a source of knowledge of the medical, psychological, sociological and economic aspects of aging in Poland is the publication of the results of the research project PolSenior: "**Aspects of medical, psychological, sociological and economic aging people in Poland,**" edited by M. Mossakowska, A. Wiecek , P. Bledowski, Poznań 2012.

The aforementioned monograph "**Strategies for action in an aging society. Theses and recommendations**", edited by B. Shatura-Jaworska, Warsaw 2012, is an interpretation of the action for seniority policy and social situation in Poland.

Another document is prepared draft guidelines "**The long-term policy for elderly people in Poland for 2014-2020**" prepared by the Department for Elderly People's Policy .

5. Support for seniors' education

Providers of seniors' education in Poland are:

A) Universities of the Third Age, which aim to:

- to enable older people to gain knowledge that could not be educated in their youth, and always wanted to study - today is the implementation of the idea of lifelong learning,
- to implement gerontological research - today is a huge need and a big challenge for contemporary demographic changes,
- to improve the quality of life of the older generation such as by promoting healthy attitudes, encouraging physical activity, mental and artistic expression, the opening of the challenges of the future (information society, knowledge society)
- dissemination of knowledge about active aging and old age in society and between decision makers responsible for social policy.



The first UTA in Poland was established 1975 in Warsaw.

B) Senior Citizens Club - a support group in local areas for people with reduced mobility. They are led by community leaders, who are established and subsidized by Municipalities. Activities conducted in these Clubs concern prevention and are opportunity for joint meetings, trips, leisure time activities.

C) Council for Senior Citizens - established by local authorities with main priority of elderly people education.

6. Dissemination of seniors' co-housing idea

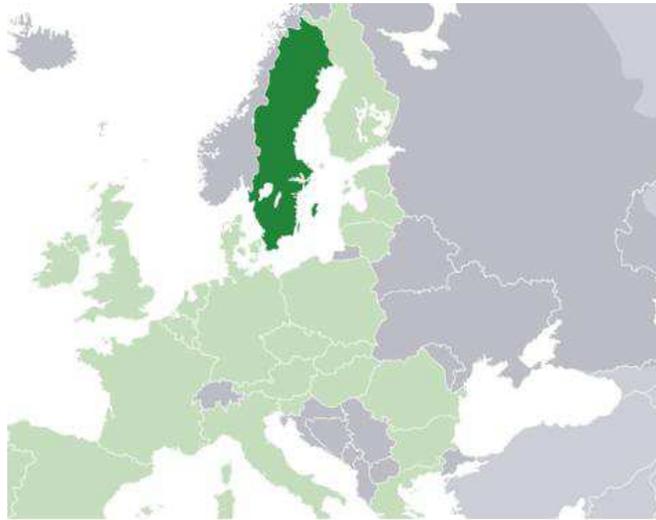
The idea of co-housing in Poland is generally not known. Only in a monograph entitled "**Strategies for action in an aging society. Theses and recommendations**", edited by B. Shatura-Jaworska, Warsaw 2012, mention of such a solution. In the chapter "Housing and living environment old people " by Mary Zrałek, co-housing is suggested as a good practice occurring in developed countries. The European concept, the term co-housing or cohousing in Poland can be explained as a residential community that mean something completely different than in the Co-housing and social housing for Elders `Reactivation project. Residential communities in Poland are constituted by a group of people, who from the very beginning participate in planning of residences with aim to set up communities, or better, group of houses constructed with the budget lower than commercial.

The Social Housing Associations (TBS) were established with aim to satisfy the need for seniors' housing. However, these entities do not meet expectations in this sense. Attempts to implement this idea (TBS) took in Stargard. There were prepared 22 apartments with no more than two rooms and area not exceeding 56 m², suitable for single or 2 members family. As a response to the underlying loneliness of seniors, the building provides space in common - a common room with a kitchen and two large terraces, designed for larger groups to spend free time, which arrangements helps the animator <http://www.bankier.pl/wiadomosc/Caly-budynek-tylko-dla-seniorow-2166972.html> However, this solution differs completely from the idea of co-housing.



National policies toward seniors - Country Report

Sweden



Document Details:

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Character :PARTNER 4 SWEDEN, Kollektivhus NU– Country Report

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1. Facts on seniors policies

In 2010 Sweden had 1.7 million people of 65 years of age or older. During the period 1940 – 1990 the number doubled. The number is expected to rise to 2.1 million in year 2020 and to 2.6 m in 2050. This group's share of the total population is expected to rise from 18 to 25 per cent 2060.

In 1960 the number of persons 80 years or older were 141 000, a figure which increased to 490 000 in 2010. By 2060 the number is expected to increase to close to one million.

Life expectancy in Sweden is among the highest in the world. In 2010 it was 79.1 years for men and 83.2 years for women. Among the EU member states Sweden has the second largest proportion of people aged 80 or over, constituting 5.3 per cent of the population.

Most care for the elderly care is funded by municipal taxes and government grants. In Sweden municipalities have a high degree of independence, in charge of high budgets based on considerable tax levels. For political reasons more and more municipalities have decided to privatize parts of elderly care. The unique thing about the Swedish reform is that public sector money is allocated to private profit-driven companies, which often make substantial profits from running care facilities. In 2011 private care providers accounted for 18.6 per cent of all home help to elderly people. In many municipalities recipients can in principle choose between care operators, but in practice this is not easy. The municipality has an overall responsibility for quality

control, but privatization weakens control mechanisms. Recently media have revealed alarming shortfalls among private care companies. The companies were accused of letting profit have a negative impact on the standard of care.

All Swedish citizens are entitled to a pension after they retire. People can choose to start receiving their pension between the ages of 61 and 67. From 2005 to 2011 the number of working Swedes aged 65 to 74 increased by 49 per cent. The average retire age is today 65. It will probably be changed to 67 or higher in the coming years. The longer one waits to start receiving pension, the higher it gets.

One of the aims of care in Sweden is to help elderly people and those with disabilities to live normal, independent lives. This includes living in one's own home as long as possible. Elderly people who continue to live at home can obtain various kinds of public support. For example, almost all municipalities in Sweden offer ready-cooked meals that can be home-delivered.

In 2011, home-help staff assisted around 211 000 people aged 65 or over.

Almost half of the country's municipalities also provide common meals for the elderly at special day centres, while a few organize small groups of elderly into teams that cook their own meals.

When an elderly person is no longer able to cope with the demands of everyday life, he/she can apply for assistance from municipally funded home-help services. The extent of such care is subject to an assessment of need. Elderly people with disabilities can receive assistance around the clock, which means that many are able to remain at home throughout their lives. Also the severely ill can be provided with health and social care in their homes.

The cost for elderly care depends on such factors as the level or type of help provided and the person's income. Since 2011 a maximum charge for home help, daytime activities and certain other kinds of care has been set since at SEK 1 760 (€205) per month.

Municipalities offer daytime activities for elderly and disabled people in need of stimulation and rehabilitation. These activities primarily target those with dementia or mental disabilities. Daytime activities help many to continue to live in their homes.

The elderly and disabled also qualify for publicly funded transportation services in taxis or specially adapted vehicles. This option is available to those who are unable to travel by regular public transport. In 2010 there were 11 million such journeys completed across the country, a national average of 34 per eligible person.



2. Advantages and disadvantages of seniors policies

Every decade since the 1950s, municipalities and county councils have tried new ideas for housing for the elderly in Sweden. Senior's apartments, service buildings, service apartments, local nursing homes, group homes and special care units for the elderly have succeeded each other.

The 1992 reform of elderly care (*Ädelreformen*) introduced major changes. Municipalities were given the entire responsibility for long-term services, as well as the care for the elderly and disabled. They also took charge of 33 000 long-term care places and 3 000 places for people with old age dementia from the county councils. Municipalities were also required to create housing for people with special needs: special housing facilities, or Assisted Living Facilities (ALF), as they are now called.

The 1992 reform made many municipalities start phasing out housing that did not meet modern requirements. In addition, places in special housing facilities have declined, partly because many today receive health and social care in their own homes, and partly due to cost reasons. A third reason is demographic: fewer people were born in the 1930s than the decades before and after. The number of places in special housing facilities has fallen from 118 600 in 2000, to 94 200 in 2008.

Many of the lost retirement housing facilities were converted into different types of apartments for the elderly; primarily into what became known as Senior's Accommodation. This type is ordinary housing for people above a certain age, usually 55 years. Sometimes there can be common premises and perhaps a host. The residents themselves are responsible for activities; the costs for the premises and host are usually included in the rent or set as a separate fee. Anyone who is interested in Senior Housing needs to take the initiative him/herself, either by contacting a housing company or by buying a condominium apartment.

Since year 2000, the number of Senior's Accommodations has increased, from 11 000 to 33 000. Half of the increase consists of converted retirement housing. The overall supply of housing for the elderly has thus shrunk at the same time as there is a steady increase in number of pensioners.

Today about 25 per cent of all housing is assessed as being physically accessible to the elderly. Nevertheless, the elderly often live in "older" homes; with narrow spaces, many steps and no lift. The question is whether or not it is possible to adapt existing homes and areas so that the elderly can continue to live well at home. And how big a problem is the hidden misery of the people trapped in their own homes? Insecurity



and isolation are significant problems, just as physical or mental illness.

Since the public sector in Sweden has the responsibility for elderly care there is little need for charity foundations or other independent actors to provide care based on private fees. Private insurance for elderly care is virtually non-existent.

3. Support of local and national governments to seniors' social housing and co-housing

Many municipalities have made ambitious plans to enable the elderly to continue living in their own homes. Often municipal housing companies are made responsible for these plans. In this way good quality dwellings can be supplied as regular tenancies, which is what many retirees want. Some components of the work include: inventories of accessibility of available housing; dwelling quality ratings from the availability point of view; clear information on the website regarding supply and resources; and development demands in new housing projects of Senior's Accommodations.

A Parliamentary committee in 2008 concluded that it is not suitable for everyone to continue living in their own home and suggested a division of housing for the elderly into four categories: a) ordinary housing, b) 55 +housing, c) senior housing and d) sheltered housing.

Ordinary housing: Today, almost 80% of all elderly people live in ordinary housing – in apartments, single-family dwellings or row houses. However, half of all the housing where the elderly live is inaccessible to people with physical disabilities.

55+ housing: This is a collective term for kinds of ordinary housing distinguished by good accessibility and sometimes access to common areas. A certain minimum age is required. This option is included in a broader selection of apartments and services in the ordinary housing market and is included in the framework of laws governing the municipal responsibility to provide housing. These homes are offered through protected tenancy, tenant ownership or cooperative housing.

Senior housing: Until December 2011 there was governmental support for the construction of secure housing. Certain requirements were set for common areas and access to personnel, etc. One person in the household must be at least 70 years old. In many municipalities there are local solutions for secure housing for the elderly, and these are not included in the governmental support program.

Sheltered housing: This type of housing is for people with nursing and care needs and



is provided by the municipality according to individual decisions. There is governmental investment support for assisted housing. In 2010 1.9 per cent of the population over 65 years of age lived in assisted housing.

The delegation also proposed a new type of housing for the oldest groups; a special type that is not tested, but where it is possible to get some professional care, and to have access to common premises and meals. Since 2010 these types of projects receive government investment grants from the same funding allocation as the other special housing units.

Many municipalities have begun to introduce the new types of housing for the elderly. Service buildings that have not yet been converted, as well as Assisted Living Facilities that are threatened by closure, are likely to be turned into these kinds of special housing units. In 2010 over 600 of these homes were ready for occupancy.

In 2009 there were around 33 000 Senior's Accommodations. Since then the plan is to build 3000 – 4000 new units per year. Most of the new Senior's Accommodations will be regular tenancies, out of which public housing accounts for approximately two thirds, while one third will be privately owned. There are far fewer condominium projects and cooperative housing associations. The actual number of new housing units will most probably be much lower, partly due to the economic situation.

Most people do not realise that they must seek out senior housing before they are 70 years old. Many also feel reluctant to go for special housing for seniors. They see it is as yet another step towards separate accommodation.

Adaptation of housing: For the elderly who stay in their own homes, there is also the possibility to get assistance in adapting their home so that it is easier to live in it. In the planning and construction laws, requirements are set forth for the accessibility and adaptability of housing, so called 'visitor accessibility'. Despite this, it can be difficult for people with impaired functionality to live in either new or older dwellings. When this happens, in certain cases it is possible to get help with so called housing adaptation, which means that the municipality will adapt the apartment free of charge.

In the public Swedish debate it is often argued that the public sector is oversized and not efficient, for which reason new, less expensive, independent forms of care are needed. Counter to this it is maintained that Swedish welfare services have been functioning well for many decades and that we could afford a much bigger public sector in periods when Sweden was considerably poorer. A new line of thought among environmental researchers is that welfare services are much less detrimental to the environment compared to the manufacturing of consumer goods. One may ask



whether demands to shrink public spending will lead to the development of independent organisations taking over responsibilities for elderly care, or whether increased spending on publicly financed welfare services will in fact contribute to solving the climate problems. Mutual support in self-administered care units, independent from the state, can be regarded as tools to absolve the public sector from its duties or, alternatively, be used to put pressure on the state to use tax money for socially just purposes, including care for the elderly.

4. Existing reports and researches on active ageing and future challenges for seniors' policies

During the last ten years, good knowledge about seniors conditions and senior housing have been assembled through government commissions, research and other initiatives:

1. Blomberg, Ingela & Kärnekull, Kerstin, *Bygga seniorboende tillsammans – en handbok*, Svensk Byggtjänst, 2013 (a handbook for seniors who want to live in community. The aims to help individuals, groups, municipalities, architects and housing associations).
2. Holm Bodin, Johanna, *Femti funderingar om äldres boende*, Sveriges kommuner och landsting, Stockholm, 2012
3. Kärnekull, Kerstin, *Bygga för seniorer*, Svensk Byggtjänst, 2011.
4. Meagher & Szebehely, (ed): *Marketisation in Nordic eldercare: A research report on legislation, oversight, extent and consequences*, To be published in 2013
5. Svensson, Elisabet, *Bygg ikapp: för ökad tillgänglighet och användbarhet för personer med funktionsnedsättning*, 5. utg., Svensk byggtjänst, Stockholm, 2012 Sverige.
6. Sverige. Äldreboendedelegationen, *Bo bra hela livet: slutbetänkande*, Fritzes, Stockholm, 2008
7. Sverige. Äldreboendedelegationen, *Bo för att leva: seniorbostäder och trygghetsbostäder: delbetänkande*, Fritzes, Stockholm, 2007
8. Szebehely, Martha och Ulmanen, Petra, *Åtstramningens pris. Hur påverkas de medellåders barnen av äldreomsorgens minskning?* Rapport för Kommunal 2012.



9. Wiklund, Gabriella & Melin, Stefan (red.), *Bo bra på äldre dar: [kunskap, kreativitet, kvalitet]*, Svensk Byggtjänst, Stockholm, 2013

Facts about seniors can be found at different websites:

www.sweden.se Facts about Sweden Elderly care

www.sweden.se Facts about Sweden Disability Policy

www.hi.se Housing for seniors

www.msb.se The Swedish Civil Contingencies Agency

www.scb.se Statistics Sweden

5. Support for seniors' education

Swedish popular education (*folkbildning*) is the collective name for the activities conducted by the country's folk high schools and study associations in the form of courses, study circles and cultural activities. *Folkbildning* is a part of the liberal non-formal educational system. Every year, several million Swedes participate in *folkbildning* activities.

Folkbildning is open to everyone in society. Everyone participates on equal terms, but based on different conditions. People seek knowledge and development through *folkbildning* for various reasons such as personal development, increasing the chances of finding a new job, or simply a desire to learn.

In study associations and folk high schools, opportunities of lifelong learning are provided through a rich supply of courses and educational programmes – everything from study circles where a small group meets a few times in their leisure time, up to multi-year, full-time courses of study at folk high schools.

The National Council of Adult Education's circle participant surveys show that the proportion of older circle participants has increased over time, in pace with population growth. According to Statistics Sweden's information, however, the proportion of circle participants who are 65 years of age or older is significantly larger than this group's share of Sweden's population – 33 per cent compared with 18 per cent of the population. (Source: National Council of Adult Education, <http://www.folkbildning.se/Folkbildning/Oversattningar/>).

A recent study has shown that increase in educational level counteracts expected



severe ill-health as a result of an ageing population. This could also be an argument for seniors' education in general. (Batljan, Lagergren, Thorslund, 2009).

6. Dissemination of seniors' co-housing idea

Dissemination of the cohousing idea is to a large extent carried out by each cohousing project itself. However, the national network Kollektivhus NU supports dissemination and promotes contacts between existing cohouses. Most of the cohouses have an Open house weekend every year in the beginning of October when usually many people visit the house to get informed. Kollektivhus NU arranges seminars and makes current research available to members. Much of the dissemination is carried out by the inhabitants in the single cohousing project through receiving visitors for dinner or taking care of study groups, and when visitors find the idea appealing they spread the idea further.

In Stockholm, Gothenburg and Karlskrona, local associations are engaged in forwarding new co-housing and senior housing projects (Föreningen Framtiden, Boihop, Karlskrona Seniorhusförening).

A few municipalities promote the idea of senior co-housing or communal living, among them Gothenburg and Karlskrona. Some also encourage building communities (groups of people that act as a client together, trying to realize their own ideas about housing and living).

The National Board of Planning has financed some studies of co-housing projects in Mölndal and Malmö: <http://www.boverket.se/Om-Boverket/Webbokhandel/Publikationer/2005/Leva-och-bo-i-gemenskap/>.

<http://www.boverket.se/Om-Boverket/Webbokhandel/Publikationer/2007/Bifrost-Molndal/>.

