

## **Measures for social inclusion of the elderly in Denmark**

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# Measures for social inclusion of the elderly: The case of volunteering

Working paper





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# EU overview and conceptual framework 1

## Introduction – the EU policy context

Europe is today facing unprecedented demographic change that includes a previously unwitnessed ageing of the population. Demographic ageing is accelerating, and as the EU's active population will start to shrink from 2013–2014, the number of elderly people aged 65–79 years will increase significantly after 2010 until around 2030 (by about 37.4%). With life expectancy increasing all the time, European Member States are witnessing the presence of an ever-rising number of very old persons (those aged 80 years or above): an increase of 57.1% between 2010 and 2030 (European Commission, COM(2005) 94 final).

In view of the demographic and societal changes, social inclusion of the elderly and strategies to promote voluntary work among older people are of growing importance. However, given the increasing life expectancy, it must be taken into account that older people are already a heterogeneous population group and are increasingly becoming so. This means that old age is characterised by a growing diversity in lifestyles, values and specific chances and challenges. Consequently, older people's resources in terms of finances, health and social contacts are also extremely diverse and decisively influence the personal scope for autonomy, active participation and the assumption of responsibilities in old age.

These developments play an important role in the current agenda of the European Union, where one of the main aims of EU policy is to ensure both solidarity and non-discrimination among the EU population. The European Year for Combating Poverty and Social Exclusion in 2010 (<http://www.2010againstopoverty.eu>) had two central targets:

- to recognise the fundamental right of persons experiencing poverty and social exclusion to live in dignity and to take an active part in society;
- to promote public support for social inclusion policies, emphasising collective and individual responsibility in combating poverty and social exclusion, and fostering commitment by all public and private actors.

Promoting social inclusion, in particular through the reduction of poverty, is also one of five key areas of the Europe 2020 strategy (European Commission, 2009a). Taking into account a higher risk of poverty among the elderly population – although old age is not synonymous with poverty everywhere in the EU (Hoff, 2008) – older persons belong to the most important target groups of the Europe 2020 strategy in terms of reducing the risk of poverty, and in its wake, social exclusion.

The terms 'exclusion' and 'inclusion' were introduced at European level in the mid 1990s. Since then, they have formed the theoretical points of reference to achieve substantial progress in eliminating poverty and social exclusion. In order to reach this goal, the national action plans and the Community Action Programme have been coordinated on the basis of an 'open method of coordination' and pooled (European Commission, 2004) with the individual strategies and measures relating to various political fields, such as social protection, health, education, housing, mobility, culture, sports and leisure. In view of the multitude of definitions of inclusion and exclusion, this project follows the EU definition that sees exclusion as a complex and cumulative process that is affected by a wide range of different factors and not only by material deprivation. According to the European Commission (2004), exclusion is:

*'a process whereby certain individuals are pushed to the edge of society and prevented from participating fully by virtue of their poverty, or lack of basic competencies and lifelong learning opportunities, or as a result of discrimination. This distances them from job, income and education and training opportunities, as well as social and community networks and activities. They have little access to power and decision-making bodies and thus often feel powerless and unable to take control over the decisions that affect their day to day lives.'*

## Older people – a group with a high risk of social exclusion

There is empirical evidence that the risk of becoming socially excluded is widespread among older people, particularly among those who have left the labour market, and that their respective risk is even rising with age. In consequence, social exclusion in old age mainly affects very old people, and among them particularly older women. Already in 1994 the Council of Europe took up this issue in recommending that the Member States were to take policy initiatives to prevent the social exclusion of older people by promoting their social integration (Council of Europe, 1994). In this context, it stressed the joint responsibility of the welfare state, the family, the market and the voluntary sector.

However, given a high degree of social, regional, cultural and cohort-specific heterogeneity among Europe's elderly population, it can be assumed that the risk of social exclusion (not only among the elderly) is not equally distributed in Member States. Social exclusion among the elderly in Europe is highly dependent on the respective welfare regimes and the quantity and quality of existing social, health and care services and other services geared towards the social integration of elderly people (Hoff, 2008). Research data show that social exclusion among older people is distinctly less common in the Scandinavian countries than, for example, in the new eastern European Member States (Szivós and Giudici, 2004; Ogg, 2005; Jehoel-Gijsbers and Vrooman, 2008). However, differences can be found not only across countries, but also within them – taking the growing social heterogeneity of older people as one of the main features in all modern ageing societies (Naegele, 2010).

The evidence also reveals that risk factors for social exclusion in old age vary widely across the EU, as shown by a number of further differences in various terms, of which the following four dimensions are of major importance: 1) the state of welfare policies, 2) environmental dimensions, 3) health status and life expectancy, and 4) social networks, family status and family ties.

- (1) With a view to the type of welfare regimes and state of welfare policies, distinct differences between the EU Member States can be observed (Ogg, 2005). There is clear empirical evidence for the correlation between material deprivation and poverty on the one hand and social exclusion on the other hand in old age. In all, the lowest share of social exclusion can be observed in the EU's Nordic countries and the Netherlands. Social exclusion is highest in the EU's new Member States (Jehoel-Gijsbers and Vrooman, 2008; Hoff, 2008).
- (2) Environmental factors can also have an impact on the degree of social exclusion. This particularly refers to older people. On the one hand, in the western Member States, living in an urban area can be a risk factor for social exclusion. Restricted mobility can also lead to social exclusion (European Commission, 2010b).
- (3) It appears that social exclusion in old age is strongly related to very old age partly due to the strong correlation between advanced age and chronic diseases (both objective as well as self-perceived) and/or being needy of care (Federal Ministry for Family Affairs, Senior Citizens, Women and Youth (BMFSFJ), 2006a). Even if the life expectancy in the EU as a whole has increased over the last 50 years, the difference throughout the Member States is significant.
- (4) Family status and family relations strongly influence the risk of being socially excluded, especially among older women and particularly in the case of widowhood and divorce (Hoff, 2008).

On the whole, elderly people (those aged 55 years and above, according to Jehoel-Gijsbers and Vrooman, 2008) in the Nordic countries and in the Netherlands are the least excluded from society. The Continental (including Germany) and Anglo-Saxon countries follow, and then the Mediterranean countries. In eastern Europe, the social exclusion of older people is most pronounced, especially in the Baltic states and Poland. The Czech Republic and Slovenia, on the other hand, have similar figures to Spain and Italy (Jehoel-Gijsbers and Vrooman, 2008).

## Volunteering as a tool to promote social inclusion in old age

In searching for measures to promote the social inclusion of the older population, EU policies give special attention to encouraging volunteering. In the context of the European Year of Volunteering in 2011, the EU wants to ‘encourage and support – notably through the exchange of experience and good practices – the efforts of the Community, the Member States, local and regional authorities to create the conditions for civil society conducive to volunteering in the European Union (EU) and to increase the visibility of voluntary activities in the EU’ (European Commission, 2009b). The main objectives are the creation of suitable general conditions for voluntary work as an important part of civic participation as well as the empowerment of volunteer organisations. This is of particular importance for volunteering in old age. In addition, the quality of volunteering is also regarded as a major challenge. Another important issue that will be addressed within the scope of the European Year of Volunteering is raising awareness and appreciating the importance of volunteering for the development of social cohesion.

Due to cultural and historical differences, volunteering (of all age groups) is deeply rooted in the countries of the EU. While some countries (for example, the United Kingdom (UK) and the Netherlands) have a long tradition of volunteering and a strong voluntary sector, the sector is little developed or is still being set up in other countries (such as Bulgaria, Greece and Romania). Although there is no EU-wide uniform definition of volunteering, the distinction between ‘formal’ and ‘informal’ volunteering (Hank et al, 2005) is used in nearly all Member States to indicate different ways of being engaged in volunteering activities. The project itself explicitly focuses on formal volunteering typically taking place in an organisational framework – for example, linked to local authorities, churches, organised self-help groups or welfare organisations.

The extent and significance of organised voluntary work in the various societies seems to be related to a strong economic development and to a long democratic tradition, which have had a positive influence on the non-profit sector. By contrast, the previously communist countries have an underdeveloped organised voluntary sector (GHK, 2010). Furthermore, general social conditions have an influence on the readiness of senior citizens to commit themselves in a socially voluntary sense. In countries in which the general institutional conditions and structures of opportunity for voluntary work are very pronounced (as in Scandinavia), the probability of individuals extending their voluntary involvement or taking up new voluntary work is substantially higher (Hank and Erlinghagen, 2008). A high degree of religious and political freedom and a large volume of public expenditure on social services also favour the volunteering of older people.

In a further differentiation, the different types of welfare regimes can in particular be cited as factors influencing the extent and organisation of formal volunteering not only among elderly persons but for all age groups in general. There seems to be a tendency that the availability of financial means and other resources is one of the promising preconditions. For instance, this is particularly true for Scandinavian countries (GHK, 2010). Some EU Member States have registered an increase in volunteering in the past few years, most notably Belgium, Denmark, Germany and Spain.

Data from the Survey of Health, Ageing and Retirement in Europe (SHARE) confirm the north–south gradient for formal volunteering: while the Netherlands, Denmark and Sweden show the highest rates of participation among older people, the respective rates in the Mediterranean countries (Italy, Greece and Spain) lie considerably below the average value. Germany, France and Switzerland take up middle positions (Hank and Erlinghagen, 2008 and 2010).

In almost all EU countries, a positive correlation can be observed between the level of education and volunteering (GHK, 2010; European Commission, 2007). Even if there are only slight differences, depending on the age groups (age 50–64 and 65–79 years), SHARE data confirm that from the age of 75 years onwards the probability of involvement in

voluntary work declines sharply. In all, SHARE findings show that older people at risk of social exclusion are less likely to be involved in voluntary activities (Hank et al, 2005; Then, 2009).

There is empirical evidence in all EU Member States, that the involvement potential of senior citizens, and especially those at risk of social exclusion, has by no means been fully exploited. To increase their participation in voluntary activity it is therefore necessary to develop targeted strategies that contribute to an improvement in the general conditions of volunteering. The importance of the voluntary work of elderly people too for the development of social solidarity was already underlined in 1997 in Declaration 38 on voluntary service activities, which was attached to the Final Act of the Treaty of Amsterdam.

### Aims of the ‘Measures for social inclusion of the elderly’ project

Even if it is apparent that the volunteerism of older people does not yet receive the attention it warrants in view of the challenges of demographic change and of the question of how the available potential can be tapped, it is clear that the Member States already have manifold initiatives and projects at the national, regional and local levels. The European Commission has announced that it will, within the scope of its powers, support the Member States in their endeavours to promote the voluntary work of older people and to strengthen intergenerational solidarity.

The basic assumption of the ‘Measures for social inclusion of the elderly’ project is that older people’s volunteering might be a tool to fight social exclusion and thus to promote both social inclusion of the elderly population (Institute for Volunteering Research, 2004) as well as social cohesion and quality of life among all generations (Greenfield and Marks, 2004). The main aim of the project is to identify measures (as well as promoting factors) that support the goal of social inclusion for elderly people. This report is on phase I of the project, which covers five countries: Denmark, Germany, Italy, the Netherlands and Poland. Focusing on initiatives that promote primarily formal voluntary work mainly at community level, the project wanted to identify enabling factors and impediments in order to develop recommendations for the enhancement of these measures.

In doing this, the project keeps in mind that the concept of volunteering is extremely multifaceted and heterogeneous and that there is no uniform definition. In order to define more precisely the object of the research presented here, the project distinguishes between ‘formal’ and ‘informal’ voluntary work. Formal voluntary work is linked to an organisation outside the private home or the family, such as clubs and associations; informal voluntary work takes, for example, the form of self-help, support within the family or assistance to neighbours (Hank et al, 2005). However, the project itself explicitly focuses on formal volunteering typically linked to an organisation with a benefit for the community and the volunteers and without concern for financial gain.

Although volunteering is very often understood as a sub-type of civic engagement, this is not the focus of the project. Civic engagement goes beyond the scope of formal volunteering as it is conceptualised in this project. Volunteering can be interpreted as an element of civic society that is seen as a principle to shape society and thus is built on political and/or societal self-organisation and/or the readiness to participate in societal and political activities mainly at the local level – for example, in political parties, citizens’ action committees or in other types of political participation, representation or self-organisation. This project focuses on volunteering in old age, which is primarily directed to other individuals or groups – very often socially disadvantaged – and thus contributes to social solidarity. In this sense, volunteering has both a benefit for others as well a benefit for the volunteers themselves.

## Conceptual framework

In order to describe the relationship between the social and material situation of older people and the risk of social exclusion, and – following this – to identify appropriate measures for the promotion of social inclusion, a theoretical framework has been developed.

Firstly, following the proposal of the European Union, social exclusion has been regarded as far more than material/financial deprivation and poverty (which, however, are complementary to each other). Rather, social exclusion is a more comprehensive concept that refers ‘... to the dynamic process of being shut out, fully or partially, from any social, economic, political or cultural systems which determine the social integration of a person in society’ (Walker and Walker, 1997). This multidimensionality is a key element and a crucial advantage of the social exclusion concept over that of poverty, because it conceptualises exclusion as a multifaceted phenomenon involving deprivation across a range of material and immaterial dimensions (Layte et al, 2010).

Consequently, when focusing on older people, the risk factors for social exclusion that were taken into account were those of particular significance for both typical (‘age-related’) social risks in old age as well as the life situation of older people in general. In doing this, the project did not follow a general conceptualisation of social exclusion (and its respective risk factors) that is in principle true for all age groups – like the four domains of social exclusion distinguished by Jehoel-Gijsbers and Vrooman (2008). Rather, the project took certain risk factors as points of departure because they are of particular significance for the risk of being excluded in old age and particularly in very old age (Naegele, 2010). In this context, the sociological concept of *Lebenslage* has been used (Bäcker, Naegele et al, 2007).

In the *Lebenslage* concept, social risk factors, particularly among the ‘oldest old people’ are seen – apart from poor economic and health status – primarily in weak social networks (including family relations and ties, widowhood and divorce). These are the social risk factors that might lead to isolation and loneliness, poor access to informal social support, poor access to social, health and care services, restricted mobility, bad housing conditions as well as other environmental factors like living in rural areas (Clemens and Naegele, 2004; Hoff, 2008). In this context, the self-perception of being old and belonging to the group of ‘aged people’ has been taken into consideration in the research; keeping in mind that empirical data show a strong correlation of belonging to the group of socially disadvantaged people and a negative self-esteem (BMFSFJ, 2006a).

In consequence, phase I of the project linked the concept of *Lebenslage* with the sociological concept of social exclusion – both focusing on older persons. More practically and empirically based, social exclusion of older people was mainly conceptualised as low or even lack of participation in both formal and informal social and/or family networks, including leisure activities, inadequate social support and social isolation. Furthermore, social exclusion in old age was also understood as inadequate access to social, health and care services for the elderly as an important sub-dimension of social exclusion (Jehoel-Gijsbers and Vrooman, 2008). Therefore, phase I regarded social exclusion as a significant sub-dimension of societal disintegration (Walker and Walker, 1997).

Apart from the concepts of social exclusion, *Lebenslage* and disintegration, a fourth concept used in phase I was that of ‘active ageing’ (Walker, 2002a and 2002b). This concept is the currently most advanced for strengthening the participation and integration of older people within society. According to this concept, active ageing is defined as a ‘process of optimising opportunities for health, participation and security in order to enhance quality of life as people age’. In this broad definition, the concept of activity is not restricted to the production of goods and the labour market only, as it very often and misleadingly has been.

Consequently, in its conceptualisation the project did not follow the labour market approach of active ageing but rather explicitly followed the interpretation of the UK sociologist Alan Walker, which primarily encompasses – among other categories – the areas of health, social integration, participation and inclusion with an overall focus on quality of life. In doing this, the concept focuses not only on the individual ageing process in order to enhance one's quality of life. Rather, it explicitly takes up a societal perspective with a special focus on disadvantaged groups. In this context, volunteering and civic engagement in old age are seen as a basic component of active ageing encompassing two dimensions of being useful, for the individual as well as for society as a whole ('individual and societal usefulness'). Accordingly, volunteering and civic engagement in old age contribute to health and active ageing and reflect active citizenship (BMFSFJ, 2006a).

This operationalisation reveals the value of the active ageing concept for the development of social inclusion measures. Taking into account the heterogeneity of elderly people and explicitly involving risk groups for social exclusion, the concept accentuates the conditions and premises for participation of the elderly and focuses especially on empowerment structures on different societal levels. In this context, volunteering serves as a vital field of action and organisation at community level. Involvement of the municipalities as the central environment of human life is particularly called for here (Naegele, 2008). The focus is on greater participation of older people in community life, with the aim of increasing their involvement and shaping their local environment. This also means that the potential contribution and resources of elderly people do not only have to be regarded in an individual perspective, but may also point at their responsibility for a mutually supportive community. In this context, a public obligation (*Vorleistungsverpflichtung*) is also called for to promote this potential and to shape an adequate framework for its realisation (BMFSFJ, 2006a).

In a broader European perspective, a link is also made between active ageing and volunteering. A position paper by the European Older People's Platform (AGE, 2009) states that it is:

*'calling for 2012 to be declared as the European Year on Active Ageing and Intergenerational Solidarity as our members consider that senior volunteering is a vital component in the promotion of active ageing ... AGE considers that a European Year on Volunteering could complement and provide a structured link to 2012 as the European Year on Active Ageing and Intergenerational Solidarity'.*

In consequence, the project is explicitly interested in such measures of mainly formal volunteering in old age primarily at local level which might serve both the older volunteers themselves to promote their social inclusion and/or to avoid social exclusion as well as those who benefit as recipients from volunteering of elderly people who are at risk. In all, these assumptions and concepts served as a theoretical framework for the project and as selection criteria for the case studies in phase I.

The first phase of the research aimed at investigating measures promoting the social inclusion of the older population who have already left the labour market (people above 65 years of age) in five EU Member States. Special emphasis was placed on measures encouraging volunteering.

## Country selection

Phase I focused on the following countries: Denmark, Germany, Italy, the Netherlands and Poland. These countries were selected because – as shown by the above-presented empirical results – substantial differences exist between them in the degree of social exclusion of senior citizens, and their participation and volunteering structures also differ widely. In Denmark and the Netherlands, where the social inclusion of senior citizens is well advanced, volunteering has a strong tradition. Poland, on the other hand, is one of those countries in which the social exclusion of older people is quite common, both from the economic and structural point of view and in terms of social participation. Germany takes up a middle rank in both respects. In terms of social exclusion, Italy ranges between Germany and the eastern European countries, and is characterised by strong religious institutions and charitable activities in the areas of social welfare and health.

## National background reports for the five countries involved

To get some background information on measures for social inclusion of the elderly in the five countries, national correspondents delivered background reports. The national correspondents were asked to address the following issues:

- the main objectives of a national policy targeting older people's social exclusion;
- whether the measures included support for the volunteering of elderly people at national level by the provision of any kind of financial, legislative and other incentives from municipalities, local governments and/or local non-governmental organisations (NGOs), or other neighbourhood organisations;
- the role of volunteering in measures for transition from work to retirement.

## Country case studies

In each of the five selected countries, the national correspondents carried out three cases studies of successful measures/initiatives. They had the following goals in mind:

- to identify obstacles hindering volunteering;
- to learn from lessons from current measures and good practices that could be applied in other countries with different institutional set-ups.

## Case study template

As pointed out above, the project focused on formal voluntary activities. Topics for the measures/initiatives and the examples of good practice chosen were not predefined. This was to increase the chances for locating a wider range of possible measures and initiatives. However, according to the project target, selection criteria for the topics should:

- focus on senior citizens who are exposed to/at risk of social exclusion;
- mainly include older people as agents in formal social volunteering;
- if possible focus on measures at community level.

In line with the main goal of the project, ‘good practice’ in this field was broadly defined as volunteering measures/initiatives that reduce the risk of social exclusion for older people. As a first step, each national correspondent proposed several possible measures/initiatives according to the selection criteria. Secondly, a template for the case studies was developed. This served the national correspondents both as final selection criteria to make sure that the selected cases would provide relevant information and as the research design for the case studies. The following aspects were then explored:

*1. Content and target including target groups*

The introductory part of the case study template should provide relevant information on the targets and main activities of the measure/initiative, encompassing information on its history and resources as well as relevant background information.

*2. Recruitment, involvement and participation*

This section should contain relevant information specifying the initiative’s target groups (for instance, according to age, gender and living conditions), with a view determining the extent to which and in what way groups at risk of social exclusion are involved in it. Information should also be included on the connections of the measure to other initiatives or local authorities as well the involvement in networks.

*3. Promoting factors, obstacles and barriers*

In this part, the case studies should deliver basic information and detailed knowledge about promoting factors as well as barriers to both volunteering and the measure/initiative.

*4. Results and effectiveness*

The focus of this part is on the results and effects of the measure/initiative on the central issue of the project: to what extent is it successful in ‘activating’ or motivating older people at risk of social exclusion to take part in volunteering? It should also provide information with regard to the project’s hypotheses and the effects at individual level such as better health and well-being, prevention from isolation and development of new skills. Enablers and barriers should also be examined.

*5. Sustainability and transferability*

This section should provide information on the time frame and perspective of the measure/initiative as well as on relevant conditions for its possible transfer into other communities or countries.

Since there would be different initiatives and measures with possibly a broad range of topics, to cover all eventualities with separate questions the template was conceived as a flexible instrument for the compilation of the relevant information. The questions contained therein can be understood as ‘central questions’ and mirror the information required for reporting the case studies.

The case studies chosen from each country are introduced here by a short overview of central developments with regard to social inclusion and volunteering of older people.

### **Selected case studies**

In all, 15 case studies were completed in the selected countries. One example for each country is presented in this report.

# National background papers and selected case studies

## Germany

### Social inclusion and volunteering in Germany

In Germany, better education and effective employment promotion are regarded as key elements in the fight against and the prevention of poverty and social exclusion. As a result of economic growth and a comprehensive system of welfare state transfers, the poverty rates in Germany are among the lowest in the EU. At 13%, the overall poverty risk after social transfers is quite low. A closer look at the development of the risk of income poverty, however, brings to light a slight increase with some differences between western and eastern Germany. In the period under review (2002–2005) the share of people affected by a poverty risk increased by 3%. The data on the poverty risk of children, adolescents and young adults also show increasing rates. The relative income poverty of older people, however, remained almost constant. Irrespective of the less favourable economic environment of the past few years, only 2.6% of women and 1.8% of men drew needs-oriented basic security benefits at the end of 2006.

The needs-oriented basic security benefits in old age or in the case of a reduced earning capacity represented an instrument for the prevention of poverty in old age that is meant to guarantee a socio-cultural subsistence minimum. The benefits, for older people with a low income or a reduced earning capacity, are tax-financed and needs-oriented and also help to prevent recipients' recourse to the income of their children. These basic security payments are social welfare, not statutory pension insurance benefits. Nonetheless, it should be noted that there are quite considerable differences between various groups of older people. The low level of benefit claims must be seen against the background of a positive trend in the net income development in recent years among those aged 65 years and older.

### Volunteering

The further strengthening of volunteering and the civic involvement of seniors is regarded as an important strategy in dealing with the challenges of demographic change. In Germany, a change in perspective regarding old age is currently taking place. Increasingly, the potential contribution of older people is being highlighted, rather than their limitations. In this regard, the Fifth Report of the Federal Ministry for Family Affairs, Senior Citizens, Women and Youth on the Situation of the Elderly has explicitly stated that 'from an individual perspective (...) – in comparison to earlier generations – much better opportunities (arise) to lead a life modelled on own life plans, goals and personal values, to participate in societal developments and to become actively engaged for others and for the community' (BMFSFJ, 2006a). This is also reflected in a paradigm shift in the work with older people that comprises the following objectives:

- the stronger integration of older people into society;
- increasing the participation of seniors;
- increasing the solidarity between and within the generations;
- putting the potential of older people to good use;
- taking into account the differences in the self-help and productivity potentials.

Data on older people volunteering are available from various studies but due to different sample sizes and methodologies they lead to divergent findings. This makes it difficult to accurately assess the involvement behaviour of older people. The differences were particularly marked between the European-wide SHARE study (which revealed 10% involvement of those over 50 years old in volunteering) and the German Volunteer Survey. The German survey analyses 'current volunteering activities' in different involvement areas. Of special interest in this context is the fact that the volunteering rate in the 60–69 age bracket has risen from 31% to 37% since 1999; even if Germany is still in the lower mid-range in

an international comparison, it is nonetheless clear that there has been a marked increase in the past years. However, it must be taken into account that the voluntary work is predominantly of an irregular or temporary nature. Likewise, there has also been an increase in the surveyed willingness to volunteer. In 1999, in addition to the already involved persons, 13% of elderly people indicated that they were willing to become actively involved. This figure rose to 19% in 2004 (BMFSFJ, 2006b). The preferred areas of involvement of the over 60 year-olds were sports/exercise, church/religion, the social domain, recreation/social interaction as well as culture/music. Fire and rescue services, youth work/education, school/kindergarten, health and justice/delinquency problems played a more subordinate role (BMFSFJ, 2006b).

Analysis by age group also reveals large differences in the levels of volunteering. The latest Volunteer Survey (BMFSFJ, 2006b) shows, as does SHARE data, that volunteerism in Germany decreases with increased age among seniors. While a total of 30% of people aged 60 years and above do voluntary work, this figure was 37% in the partial sample of the 60–69 year-olds. In this younger group of seniors, the volunteering rate (in comparison to 1999) also rose most markedly – by 6%. In the group of all seniors, in contrast, the increase amounted to 4%. Accordingly, the national survey also shows a higher level of involvement of the younger cohort of seniors. The share of volunteers among those aged over 75 years declines considerably. With 4.6% of volunteers among persons aged 75 years and above, Germany is below the European average of 5.3% in this age category.

Education level is another important determining factor for volunteering. In Germany, only 5% of the surveyed seniors with little formal education indicate that they do voluntary work. The volunteering rate of people with an intermediate-level education certificate is 9%; among people with a higher education the rate is 17%. The individual's state of health and the extent of their other activities also play an important role.

In summary, it can be said that the participation in voluntary work is unequally distributed socially and people at risk of social exclusion are underrepresented. The higher the education, occupation and economic status of a person, the more likely he or she is to be actively involved in volunteering. According to studies, the socially unequal access to civic involvement has even become more marked in recent years (BMFSFJ, 2006b). Furthermore, the 'young old' are more actively engaged than the 'old old,' with more participation among men than women. In Germany, a distinct divide between western Germany and the new federal states (*Länder*) is observable. Moreover, it could be shown that those older people who were already actively involved in voluntary work in their younger years are also active in old age (Erlinghausen, 2008).

The civic commitment of older people is also in a process of change. The pluralisation of volunteerism has led to the emergence of new forms and types of volunteer work in addition to the classic forms of involvement in associations, organisations and political parties. This becomes particularly apparent in domains such as ecology and culture, school, kindergarten, health, gender and politics, as well as in the social neighbourhood (for example, neighbourhood assistance).

The motivation of groups that have so far only participated in voluntary work to a limited extent remains a great challenge. The Fifth Report on the Situation of the Elderly specifically points out the necessity of facilitating access to forms of civic involvement, in particular for socially disadvantaged population groups, inhabitants of different regions as well as members of different nationalities and migrants (BMFSFJ, 2006a). Important preconditions for this include finding a sensitive balance between autonomy and obligation and establishing a new culture of appreciation for voluntary work.

## Case study: 'Seniors help seniors'

### *Content and target*

In 1986, a dedicated group of people founded a regional organisation, the Grey Panthers (*Graue Panther*). They publicly and actively campaigned for a dignified life in old age. Among their key activities were critical visits to nursing homes (supervision of nursing homes by those concerned), information meetings for elderly people on health, pensions and nursing, the foundation of the Seniors Advisory Committee (*Seniorenbeirat*) in Minden in northern Germany, and improvement of the public transport for the elderly. In 1995, the foundation of the Mindener Association of Senior Citizens, 'Seniors Help Seniors' (*Mindener Seniorengemeinschaft Alte helfen Alten*) arose from this group. In 1997, the Alten-Dorf activity centre was completed and began operating. It comprises a day-care centre and a club house as well as a building with 12 senior-friendly apartments in a beautiful garden area. The Alten-Dorf activity centre was financed by Anna Luise Altendorf. In 1998, the association became a foundation.

The main objectives of the initiative 'Prevention of the need for long-term care of the very old' are the:

- development of needs-based and residential area-based outreach support structures for members and neighbourhoods;
- prevention of health problems and of nursing care dependency in advanced old age by means of intellectual, physical and social activities;
- creation of a community, in which everyone can play a part according to personal abilities;
- organisation of mutual assistance in advanced old age.

The initiative has formulated these goals in accordance with its motto 'People who live alone do not only need rainy day funds in old age but also a support organisation'. It primarily directs its efforts at those elderly people with reduced mobility and who cannot participate without assistance in the social life of their neighbourhoods.

To achieve these objectives, the initiative offers services and a comprehensive programme. These most notably comprise:

- keeping an emergency register and preparing emergency cards with vital information on medication and contact details of relatives, arranging home emergency call services and providing advice on home care nursing and on nursing homes;
- satisfying the need for assistance with activities of daily life, in part by means of mutual assistance (shopping services, accompanying disabled persons to doctors, lawyers and government agencies);
- maintaining a transport service so that members can attend organised events.

### *Involvement and participation*

The objective of the initiative is to enlist the active participation of as many senior citizens as possible in planning and holding the events. Generally, about 30–40 persons of the total 90 members attend the monthly planning meeting in which the programme is decided on and organisational tasks are allocated (see below). Although voluntariness as regards helping other very old people is the primary objective, the initiative has succeeded for years in organising a varied range of events and support measures.

The target group for the initiative is older people aged 65 years or more who live alone in their own households (primarily widowed women) and who wish to jointly organise their lives in old age in such a way that they are as independent and as self-reliant as possible. They want to mutually assist each other so as not to be dependent on family support and help, especially in old age. Those seniors who have joined forces as part of the initiative wish to deal with the impending problems of old age as efficiently as possible in the areas of living, health, independence and legal issues. Therefore, they have comprehensively informed themselves about these issues and have endeavoured to pass this information on to other interested persons.

Because of their high age (the average is 85 years), their decreasing independence and mobility, their increasingly impaired health, and also because they live alone, the members of the target group are at risk of being socially excluded. Many studies show that in old age especially the number of social contacts decreases and social isolation increases. Moreover, due to the increasing mobility of the younger generation, direct practical support falls away for some older people.

The measure is supported by numerous political representatives in the city of Minden. Due to the project's long duration many relationships with political and municipal representatives were built up, which are very helpful when it comes to implementing the goals of the initiative.

At local level, contacts have been established with the municipality, the borough and numerous old people's welfare organisations, the doctors' network and lawyers who offer their support and advice when questions arise. On the part of the municipality, the social commitment is greatly welcomed, as it actively supports the local initiatives for senior citizens and increases sensitivity of the Minden population to ageing issues.

### *Results and effectiveness*

By means of comprehensive public relations work, the initiative focuses attention on the problems of older and very old people who often live by themselves. The initiative has a positive influence on the social integration of elderly people. In addition to contacts with their families, they have the opportunity to exchange ideas with peers, to spend time together and to gain new impressions, which in turn stimulates new interests and enables the continuation of older ones. On the basis of the possibilities that the initiative offers, people with whom one can undertake joint activities are generally easily found. Thus, for example, people who like to visit museums or a restaurant offering foreign cuisine once a month came together.

Voluntariness is of top priority in the initiative. However, the initiative endeavours to enable everyone to contribute their skills and to put them to good use in a protective and supportive environment. Mutual support for members usually follows automatically from the many years spent together. About 40 of the 90 members perform shopping, visiting and driving services, help to organise events and activities and are involved in the programme planning and public relations work.

Participating in the support group has the following positive effects for the individuals of very advanced age working for the initiative:

- orientation in situations of radical change (for example, after the spouse's death or during other critical life events);
- creation of meaning in new life phases (for instance, the transition into retirement, upon a spouse's death or when experiencing physical/health impairments);

- integration into a broad network of non-familial social relations that offer emotional, practical and informational support where needed or in which very old people too can still offer valuable support;
- preservation and development of physical and cognitive abilities.

This has led to a steady increase in the demand of the target group for consultations and information from the support group. Because of the good contacts that various members have with the municipality, doctors and other institutions – one of these is the chair of the representative body for the interests of senior citizens (*Seniorenvertretung*) – this demand can be very successfully met.

### *Enablers and barriers*

The availability of rooms for activities and meetings as well as basic funding that the foundation guarantees must be regarded as important support factors. The very good public relations work beyond the borders of the municipal district and the excellent networking of the initiative with the relevant actors at the local and communal levels must also be mentioned in this context. Further enablers are the great commitment of long-time members who are always keen to take up new developments and thus to give new direction to the initiative. The members themselves point out as major advantages the voluntariness ('everyone can get involved or not, as they like'), the opportunity to use one's skills ('here I can do everything and get to know new things'), the mutual support of peers ('we know best what is good for us') and the prevention of loneliness and isolation ('here I always meet people with whom I can talk').

Limiting factors cited are the increasing age of the members and the accompanying health restrictions that limit the activities of some members. Moreover, the high average age of the members highlights the ageing process ('we have also aged together'). Because of these developments, the initiative has in the past few years endeavoured to win over young seniors to reach its goals and to make attractive offers for this age group too.

### *Sustainability and transferability*

This initiative has been running since the middle of the 1990s, is very well embedded in local structures, and will be pursued in the future. It could be transferred to other communities. Initiatives from other cities often inquire as to which requirements and conditions must be fulfilled for such a support group to be set up.

### *Summary*

The contribution of this project to reducing the risk of social exclusion can be seen mainly in a wide range of skills-orientated activities preventing isolation and offering a wide range of opportunities for mutual help and support. Social integration is realised and accompanied by positive health effects and maintaining skills and competences. Success seems to be a relevant challenge for the future in order to motivate new members and volunteers.

### **Further information**

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### Poland

#### Social inclusion and volunteering in Poland

It can be said that in Poland older people's issues are only now coming to the fore. The expected further growth in the number of older people should draw the attention of Polish society. This population constitutes a huge people potential and social capital which is not used enough. This partially explains the low rate of professional activity among older people and also the low rate of their social activity.

The process of building a civic society in Poland is still in its early stages. In the short time that has passed since the beginning of the system transformation (1989 – the first non-communist government), it has not been possible to form new public life institutions that would encourage greater social activity among elderly people.

Life in the 1980s and 1990s was quite difficult, which may be one of the reasons for the relative slowness of the social activation of elderly people. The bad conditions resulted in the tendency to concentrate on fulfilling the needs of one's family and household. At first, in the early 1980s – during and after the martial law period in Poland – the level of social solidarity and readiness for sharing with other people and giving them one's time was quite high. Afterwards, the tendency to concentrate on the closest family emerged.

One of the examples of this trend can be seen in queuing, which in the 1980s was mostly done by elderly people. This period was plagued by constant shortages of all necessities (for example, food and energy), thus queuing was the only way of getting any essential goods. Elderly people, being retired, had a lot of free time, which they often spent queuing. A 20% fall in the real value of income additionally limited consumption and strengthened the tendency to concentrate one's activity on the closest family members.

The transformation period brought other labour market problems limiting social activities of older people. The level of unemployment in Poland grew from 6.5% in 1990 to 16.4% in 1993. After a short improvement period, when in 1998 the level of unemployment fell to 9.5%, it soared again, reaching 20.6% at the beginning of 2004. The situation has been gradually improving, but the unemployment level is currently fluctuating around 10%.

For the older people, this was not just a period of a greater risk of job loss. Unlike western European countries, unemployment in Poland has always been the biggest problem for young people. So for older people there was a rise in the uptake of early retirement or the uptake of a 'gap retirement scheme' for those five years away from reaching retirement age. In doing this, older people wanted to make finding or holding a job easier for the younger generation.

For the same reason, many elderly people decided to concentrate their lives on helping their adult children. Such help included household tasks but also financial support of unemployed adult children.

Moreover, after joining the EU in 2004 and having access to foreign job markets, many Poles sought opportunities abroad. When one or both parents went abroad, some or all of the responsibilities of bringing up the children who were left at home was usually taken up by the older generation.

The abovementioned reasons explain why the social activity of elderly people is still relatively low. Although older people possess adequate potential and most likely feel the need for an active social life, they are forced to focus their activity on their closest family. A new stage of family development in Poland has been identified – namely, the 'extended parenthood' stage – and it very often hinders elderly people from concentrating their activity in areas outside their family.

For many years, the social involvement of older people manifested itself in their participation in various groups organised at parish level in the Catholic Church and other churches and religious orders. Belonging to such groups was grounded in religion, but also allowed for a certain degree of independence from the totalitarian system.

Among the groups operating at parishes, there were, for example, self-help groups and charity groups that collected donations and gifts and helped the poorest families in the area. The most active members in these groups have always been elderly people. This activity cannot be categorised as formal volunteering, but it can be considered to be carried out in a spirit of volunteering.

Universities of the Third Age (U3A) – which aim to educate and stimulate retired members of the community – have been operating in Poland since 1973. Initially their number grew slowly, but after the transformation to democracy the numbers shot up and now stand at about 350. The idea of a U3A is closely connected to voluntary work – elderly people not only organise their university, but also in many cases (especially in smaller universities) work at the institution for free. The most important effect of U3As is not the education itself, but rather the creation of social relationships between the beneficiaries. This leads to common initiatives and works to the advantage of other students and also other people.

Taking up voluntary work requires both society and individual citizens to reach a certain level of democratic maturity. This is especially true for local democracy, since it is at this level where the needs of individuals concerning social life participation and belonging to different groups are fulfilled. Local democracy in Poland started to develop only 20 years ago, so the habit of naturally participating in social activity has not had enough time to develop. Furthermore, strong structures of volunteer movements do not exist in Poland. Currently, a higher level of social activity can be observed among young people however, so it can be expected that a majority of them will show the same attitude in the future, when they reach their mid sixties.

The level of volunteer work development in Poland varies and depends on the age of the volunteers: young people are in a majority in terms of helping themselves and in helping elderly people. Voluntary work is much more popular in big cities than in small towns. In big cities, it is much more difficult for informal groups to emerge and function, whereas the number of groups is quite high in small towns and villages, where there is much less anonymity in relationships and thus the needs of particular people or environments are easier to define.

According to recent research commissioned by the Klon/Jawor Association and the Warsaw Volunteer Centre (Gumkowska et al, 2004), 12.9% (about 3.8 million) Poles declared that in the past 12 months they had spent time working in a social organisation or informal group. Typically, volunteers are:

- pupils and students;
- people with higher education;
- inhabitants of villages or big cities (with above 200,000 inhabitants).

Voluntary work is also connected with financial support: 89% of the people who gave their time or work for social organisations or informal groups also reported offering material support such as money or gifts.

Elderly people themselves present different levels of readiness to help other people. They can be much more often met in self-help groups and groups operating through the local parishes, but not in the formalised voluntary movement.

As a group, they show a certain level of autonomy from their families, which does not mean that they completely ignore their responsibilities. While offering help when needed, they do not give up their own aspirations and needs. Elderly

people often want to do voluntary work because they want to stay in touch with other volunteers they have met. These people do not identify themselves with the elderly community at all and can be described as 'elite' or 'adventure seeking'. Even though these are general terms they accurately show the motivations of older people in voluntary work organisations. Voluntary work very often offers different experiences to those experienced by elderly people in their professional lives and becomes a way of finding new interests and activities. However, most elderly people focus on their family's or their own problems.

The estimated number of NGOs in Poland is about 140,000. This includes country-wide organisations as well as local ones. However, it is impossible to pinpoint those that involve a high number of older people, or those that help only elderly people. It is clear, however, that there are still not enough of them. With time, the situation will improve and many problems of elderly Polish people will be solved.

### Case study: Council of Women Association

#### *Content and target*

The Council of Women Association (*Rada Kobiet Powiatu Kraśnickiego*) operates in the area of Kraśnik County (*Kraśnicki Powiat*) in Lubelski District (100,000 inhabitants, mostly farmlands, fruit farming of raspberries and strawberries). The Council of Women Association has been chosen as an example of cooperation between local government and NGOs. It is also one of a few projects that 'activates' elderly women in rural areas. For example, in Kraśnik, there is a U3A, a choir and several country clubs located in the surrounding area.

The organisation relies mostly on women from Kraśnik County. Former employees of a local government office (including the present Chair, Teresa Kamela, who used to work as a head farming councillor) noticed that local country clubs were not as popular as previously and decided to create a support organisation for them to integrate all active women from different environments in the area.

The Council of Women Association's activities can be divided into two groups: 1) integration with the local community, exchanging experience among the members (usually during meetings); and 2) promoting important values in rural areas – that is, local customs and traditions but also local cuisine. The latter is especially popular among the elderly members of the organisation and participation in local, regional and national events promoting traditional dishes and healthy food, for example, is important to them. At the level of individual villages, the country clubs constitute the main organised activity. However, year after year activity is decreasing and is mostly limited to occasional meetings.

The association relies on the social activity of its members and on small donations. Participation in different events is usually supported through local government funding. The organisation is also supported by local institutions, for example the bank does not charge for the account, the local community centre provides premises for free, and local companies or authorities sometimes lend cars or coaches. There are about 100 members in the organisation, but only 20–30 are active. The rest are passive participants. Elderly people constitute about 30% of the active members. The main weakness is the lack of a new potential chairperson capable of leading the association.

#### *Involvement and participation*

Of the 100 members in the association, about 50 are retired. The women from Kraśnik County in eastern Poland are its target group, especially those living in rural areas (former country clubs), including those specialising in local cuisine and well-versed in local customs and traditions. The women living in villages and belonging to the organisation are usually poor, over 60 years old and with only basic or professional education. As such they can be seen as potentially socially excluded.

The association was founded by employees of the local government office and closely cooperates with local authorities. Local customs, traditions and dishes have formed the development strategy of the region, which, being a farmland, does not have any industrial or investment areas. The region therefore concentrates on farm tourism, wild nature and local cuisine as its main advantages and as a result the organisation enjoys the full support of the local government for its activities. Most of the active women in the organisation also work in important positions – for example, as directors and employees of local institutions or as doctors. Thus, it can be said that an informal network of different local actors exists.

The association's format has been created by its leader and answers the local authorities' needs by supporting the city's promotion. There are occasional bottom-up initiatives, but they are not very important. However, it is important to emphasise that as far as the promotion of local cuisine and traditions are concerned, elderly people play the most important role and their activities are noticed and praised. The authorities cover some of the expenses and invite them to take part in events.

### *Results and effectiveness*

One of the main results is the integration of local leaders and activists in one organisation, which also unites people from different environments – local elites (school headmasters, doctors or clerks) and relatively older women from rural areas (usually poorly educated or active farmers). Such personal contacts form a potentially good base for different local initiatives.

Elderly women participating in different events and shows feel important and needed and start believing in themselves. Thus, they become activated more easily. One of them said: 'For such a woman the fact that she personally knows the mayor, or that she could talk to a high-ranking politician during one of the shows gives her great satisfaction. They also talk differently to their borough leader.' The women are also an example for other women in the local area, who, encouraged by their friends' experiences, want to join the organisation or start a similar one, as in the case of Annopol – a small town in Kraśnik County.

However, the organisation limits itself to promoting traditions (usually local cuisine) and only to a smaller extent does something for the local environment (regular meetings of the members, women's day events, Christmas and Easter holidays, occasional meetings with children in schools and kindergartens). Such activities are not systematically monitored in any way.

### *Enablers and barriers*

The strong side of the organisation is its acquisition of a certain 'brand name' for itself in the region. Its members are invited to every local and regional event and also travel with the local politicians to visit partner towns in other countries. Support from the local government has a positive influence too. However, small financial assets do not allow the association to take part in projects requiring their own funding. Another disadvantage is the limited scope of operation. The leader admits: 'I do realise that we should do something else and that we could be more active, but my responsibilities at work stop me from dedicating myself fully to the association.'

### *Sustainability and transferability*

The organisation was founded 10 years ago and since then it has noted a small, but stable increase in its activity. A threat to its existence might be the current leader's resignation, since there is no-one to fill her position. Another danger is a potential conflict with the local authorities, which fully support the association (financially, materially and sometimes provide meeting rooms). There is also the problem of the natural process of ageing and death of the elderly members, who hold up local traditions and customs and only to a small extent pass this knowledge on to the younger generation. Without them, the organisation would have to transform into a typical senior club, similar to a U3A. The idea itself seems easily transferrable to rural areas, where local traditions are preserved. However, the potential members are usually

dispersed around the region (with a few in each village) and are elderly. Thus, such an initiative requires external support and local authority patronage – for example, in a local activation centre.

### Summary

The project contributes to reducing social exclusion in creating opportunities for elderly women in rural regions to participate in activities that are related to their living environment and personal skills and experiences. It encourages stronger social integration between vulnerable groups and a sense of recognition and self-esteem.

### Further information

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## The Netherlands

### Social inclusion and volunteering in the Netherlands

The Netherlands belongs to the group of the wealthiest countries in the world and in the past decade the question of how this country has succeeded in stimulating wealth and in further securing its welfare state system at the same time has received much international attention. This prosperity is also reflected in the life expectancy at birth of Dutch people, which ranks among the highest in the EU: at 77.5 years for men and 82.5 for women. At 11.2 years and 12.1 years respectively, the healthy life expectancy of men and women at 65 years of age is also comparatively high (according to Eurostat data).

In comparison to other EU Member States, poverty in the Netherlands is low. Taking into account all social transfers, the ‘overall poverty risk’ of 10% is among the lowest in the EU. The groups threatened most strongly by poverty are members of non-Western ethnic minorities, single parents and households that receive low or no pension benefits. This means that older people do not as such belong to the risk groups threatened by poverty or social exclusion. Thus, the average household income of people aged 65 years and above corresponds to the median income level of people under 65 years of age in the 27 Member States of the EU (EU27). This must be viewed in the context of the fact that 90% of the active population are members of supplementary occupational pension schemes; even for the over 65 year-olds this rate is very high at 84% in 2006 (European Commission, 2009a, p. 216). Furthermore, the General Old-Age Pensions Act (*Algemene Ouderdomswet*, AOW) guarantees a minimum state pension or basic pension for people above the age of 65 years. These pension schemes contribute to the successful prevention of poverty in old age. Overall, the poverty risk of over 65 year-old people is slightly lower than that of the total population and in comparison to other EU countries there is only a small difference between men and women.

Hence, it is hardly surprising that the national strategy goals for the prevention of poverty and social exclusion are geared to other target groups: from 2006 to 2008 the main objectives were to ‘promote participation through employment, training and/or unpaid social activities; combat poverty and promote participation among children and young people; promote the use of existing provisions; address over-indebtedness’ (European Commission, 2009a, p. 213).

Concerning strategies for social inclusion, the labour market integration of groups threatened by social exclusion is regarded as the main societal challenge. Participation in the labour market secures an income, opens up opportunities for integration, self-determination and emancipation, and is regarded as key to promoting the self-esteem and self-confidence of the persons concerned. The vocational integration of ethnic minorities, single parents and long-term unemployed people are of particular importance in this respect. With regard to older people, efforts to increase their labour market participation are observable in that from 2020 the retirement age will be 66 years (currently 65 years) and in 2025 it will be 67 years.

### Volunteering

Dutch welfare policy defines volunteering as ‘work done in any organised context that is carried out without obligation and without pay, for other people or the community whereby the person doing the work is not dependent on it for his or her livelihood’ (European Volunteer Centre, 2007).

Social participation and civic involvement have a long tradition and a high value in Dutch society. A total of 60% of Dutch people are actively engaged in various fields. Four areas of involvement are usually distinguished: volunteering, support of and care-giving to relatives, care for grandchildren, as well as involvement in interest groups and political organisations.

Government initiatives for the promotion of civic commitment or engagement have existed for several decades and in the past different political initiatives have highlighted the necessity of voluntary work. In 2007, the Social Support Act (*Wet maatschappelijke ondersteuning*, WMO) came into force. It aims to improve the service provision to citizens and clients. The act gives municipalities and local institutions greater responsibility for the care and welfare of citizens. It also aims to make it possible for all citizens to actively participate in society. Volunteering plays an important role within the framework of the different performance areas of the WMO. Moreover, the goal of existing programmes is to make civic involvement in society more visible and improve the use of voluntary work to master the current social changes and challenges, such as increasing social tensions and a decreasing social cohesion.

Organisations for older people in the Netherlands also have a long tradition: the first forms of organisations that, for example, demanded a basic pension for seniors, had already come into being at the beginning of the twentieth century. A multitude of such organisations in different areas were founded after the Second World War. Only in recent years, however, did they join forces under the Central Organisation of Associations for the Elderly (*Centrale Samenwerkende Ouderenorganisaties*, CSO), the umbrella organisation representing the interests of the approximate 550,000 seniors in the Netherlands. The other large organisation is ANBO, which represents some 400,000 elderly people. Its tasks are to advise policymakers, agencies and other organisations and to support the initiatives of local groups. There is also a National Office Against Age Discrimination. Elderly people in the Netherlands hold a variety positions and have a say in different bodies. At the municipal level, there are advisory committees that advise decision makers on issues relating to older people.

In connection with a general reorientation and the modernisation of organisations and structures, the ‘social productivity’ of elderly people is increasingly being emphasised: it is no longer considered the norm that people withdraw from society once they have reached a certain age limit. However, the fact that there are old (disabled) people who have little or no opportunities for civic involvement – despite the more positive image of old age – is also taken into account.

As in other countries, it is not easy to generate reliable data on civic commitment. The Social and Cultural Planning Office (*Sociaal en Cultureel Planbureau*, SCP) has analysed a number of pertinent studies and surveys. This data show that elders are more involved than other age groups. According to the Time Budget Survey of 2005, every third person in the 55–75 age bracket was actively engaged compared with 25% of 35–54 year-olds and 17.3% of 15–34 year-olds. Furthermore, at approximately six hours, the time spent by 55–75 year-olds each week on civic involvement was about double that of other age groups.

The preferred areas of involvement were work in sports clubs, religious or ideological organisations, neighbourhood support and the support of older people who are disabled or in need of care. Voluntary work in political organisations or in trade unions only plays a subordinate role.

There are no clear findings on the development of individual civic commitment over the course of time but some studies show a slight decline in the activities of those over 65 years old both as regards the percentage of actively engaged persons and the absolute time spent on the activities (European Volunteer Centre, 2007).

As in other countries, the extent of the civic commitment of all age groups varies with the level of education in the Netherlands too, but not as strongly as in Germany for instance. Of the elderly people surveyed with little formal education, 18% indicated that they had done voluntary work in the past month. The volunteering rate of people with a certificate of intermediate education amounted to 23% compared with 27% among those with a higher education. Further variables connected with the social status and the education level also play an important role in this respect. Thus, people with strong health impairments, a low income and small social networks are less involved in volunteering.

In the Netherlands too, the framework conditions for doing voluntary work have improved in the last years and decades. The high life expectancy with a larger number of disability-free years, a comparatively speaking high level of material security and a pronounced volunteering infrastructure open up manifold opportunities for making use of the newly won time for individual and social purposes. But here too, changes are observable that point to the fact that civic commitment can by no means be taken for granted. In the Netherlands, there is a trend towards project-based and, as the case may be, temporary involvement. To some extent, there is a shift in time use towards more paid activities or involvement within one's own family, while new technological possibilities such as the internet offer older people new participation opportunities, of which they are increasingly taking up.

As a result of the demographic change, a growing number of older people will potentially be available for volunteering in the Netherlands in future. Whether, to which extent and particularly how the baby boomers for instance will become actively involved cannot yet be predicted. In any event, this area will continue to change and bring forth new forms of participation, initiatives and organisations in a country with such strong civic commitment traditions as the Netherlands.

### Case study: Onwards Together

#### *Contents and target*

Onwards Together (*Stichting Samen Verder*) is a volunteer organisation without funding that was founded by two senior citizens from Culemborg in the centre of the Netherlands in 1978. The foundation started out as a citizens' initiative aimed at the transportation of elderly citizens by car and the collection of used paper and second-hand goods to sell. Over the years, the foundation has grown to be a much bigger organisation managing several projects. Although there are now 250 volunteers working for the foundation, it still operates fully independently.

The main goal of Onwards Together is to improve the welfare of elderly and disabled residents of the municipality of Culemborg (with a total of 30,000 residents) by helping them to maintain an independent lifestyle. Concretely, this means that the foundation provides several services and programmes for elderly and/or disabled people. In addition, the foundation works to further the welfare of its volunteers by offering them a meaningful activity in an easygoing and social setting.

The foundation provides several services and programmes that add to the services offered by professional care and welfare organisations. The *Klaartje* project offers affordable transport (by bus) for elderly and disabled people in Culemborg, for example to visit activity centres or have a meal together. The project *Floortje* facilitates companions, someone to accompany people to the hospital or the doctor, a friendly person to talk with or to go out with. *Dientje* provides personal and tailored support, either in the form of advice or a referral, or help with paperwork, shopping together and doing small chores around the house (for example changing a light bulb or trimming a hedge). In addition, the foundation has a special phone number (*Luisterlijn*) for people to call, anonymously if they wish, if they just need

someone to talk to. The largest, and from a financial angle most important, project is the second-hand store Bartje. One of its special features is the coffee corner, which serves as a meeting point for frequent visitors to the shop.

Onwards Together is financially independent and part of the funds left over at the end of the year is donated to various charities. The most important source of income for the foundation is the second-hand store.

### *Involvement and participation*

The foundation mainly targets the elderly and disabled persons in Culemborg who are likely to benefit from the foundation's services. The volunteers working for the foundation are a secondary target group.

The elderly and disabled people who are using the foundation's services form a very diverse group. Some have trouble walking or have bad eyesight, others are intellectually challenged or feel lonely and depressed. A relatively large number of clients have a low income.

The foundation's volunteers come from various backgrounds. There are highly educated people who have had long careers in demanding jobs, and there are low educated people who have never had a paid job. Most volunteers (115) are between 60 and 70 years old. A significant number of members (67) are 70 years or older. Slightly more women (56%) than men are active in the foundation.

Among the volunteers there are different groups that run a risk of social exclusion. Firstly, there are more than a few volunteers aged 75 years and older. Also, the estimated number of volunteers who are without a partner is relatively high. Most of them have been widowed or divorced.

Furthermore, the foundation has several (voluntary) positions for unemployed seniors under 65 years of age – that is, the retirement age. Under the right circumstances, the social benefit office may rule that a senior is then relieved from the obligation to apply for a paid position elsewhere.

Another risk group that is actively volunteering within the foundation includes those who are physically and/or mentally challenged. Finally, a number of elderly Moroccan men meet in the coffee corner on a regular basis.

Although the foundation operates fully independently, it does engage in a number of collaborations. For example, the train service is a joint project with the Dutch Railway Company. Representatives from the foundation also participate in meetings of local volunteer organisations.

### *Results and effectiveness*

The most apparent result of the project is that it provides low-threshold services and facilities (such as the shop, transportation and companionship) for elderly and disabled persons. The services and facilities allow them to remain active and participate socially and independently for as long as possible. In 2008, there were 24,000 bus rides, 50 people were matched with a volunteer for personal support and company, 66 people had their chores done, 1,400 calls were made and answered and 172 people were accompanied on train rides.

Apart from these efforts, the foundation offers a low-threshold workplace for volunteers, with a friendly and welcoming atmosphere (of equality) that appeals to the majority of seniors. People feel comfortable and social relationships are quickly explored. Thus, to many volunteers the foundation is part of their social support network. In the interviews, for example, the respondents shared the view that volunteers who lose their partners often receive a great deal of support from their colleagues.

Volunteering on a regular basis enhances the social network, and furthers the overall welfare of participants and, seemingly, impacts positively on their health. The actual duties are also favourable with regard to the feelings of belonging and structure among volunteers. In addition, being able to contribute to society and being able to help another person makes many volunteers feel like they can make a difference and feel valued.

The personal results and effects for the volunteers are not monitored.

### *Enablers and barriers*

A number of aspects have contributed to the foundation's success. First, it is set up in a very professional manner. The managing board of five highly educated senior citizens with ample experience in management is engaged and transparent. The organisational structure is lucid, duties and functions are clearly described, and there is room for flexible services as a result of a structured planning system. In addition, the foundation provides a liability and a workers' insurance for the volunteers and the work meets the official workplace safety requirements (*wettelijke ARBO-eisen*).

Another success factor is the independent status of Onwards Together. This encourages strong feelings of ownership among the members, leading to more engagement and willingness to invest time and effort as well as enhanced feelings of responsibility for the foundation.

The diverse range of possible jobs within the foundation attracts people from a variety of backgrounds. This makes for a dynamic organisation. Finally, the informal, relaxed and friendly atmosphere is an undeniable and important contributor to the foundation's success.

Occasionally, the project does experience a setback. A recurring issue is the management of a large group of volunteers. Operating in a strong horizontal structure, the project leaders invest a lot of time and effort to confer with, convince and reach mutual satisfaction and agreements between the volunteers. One of the project leaders formulated it nicely, saying that she was managing 'a full group of kings and queens'.

Another issue that the foundation faces is the particularity of citizens who have gradually grown accustomed to the services and facilities, almost considering them as a natural right. This occasionally puts a lot of pressure on the volunteers.

A future challenge for the foundation is to attract and recruit new and 'young' volunteers to be able to extend its services and innovate. As many volunteers tend to work with the foundation for longer periods, there is a risk it will 'age' too much, making it less attractive to younger generations. However, the board is well aware of this pending risk and continuously encourages innovation and an open approach.

### *Sustainability and transferability*

The project has been running for over 30 years and the board has no reason or intention of letting it come to an end. As a concept, the project is highly transferable. People interested in setting up the concept must consider a few key conditions. As the second-hand shop is the most important source of income for the project, there must be scope for a (new) second-hand shop in the local situation. Also, one or more inspiring and capable individuals have to be willing to head the project. Finally, the municipality must be prepared to provide free accommodation or charge only a small amount.

### *Summary*

The foundation contributes to the prevention of social exclusion of senior citizens in various ways. The services and facilities enable users (mostly elderly) to actively participate in society and maintain a social network. Volunteering in a

professional organisation also enables people to feel satisfied and valued by society. Furthermore, the social networks of volunteers working with the foundation will expand. This gives them a higher 'social capital' to fall back on in difficult times.

### Further information

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Stichting Samen Verder, *Beleidsplan Stichting Samen Verder, Beleef de identiteit van SSV*, Culemborg, 2009.

<http://www.stichtingsamenverder.com>

## Italy

### Social inclusion and volunteering in Italy

#### *Groups of older people at risk of social exclusion*

According to the 2008 research carried out on the general secretaries and welfare delegated councillors of 415 Italian municipalities, caring for and supporting older people should incorporate the use of all resources to fight social exclusion (Caritas Italiana – Fondazione 'E. Zancan', 2008). Therefore, older people are considered at risk of social exclusion; their characteristics overlap with the classic indicators of social exclusion, of which poverty is the most common.

Older poor people are at the highest risk of social exclusion. In Italy, to be poor in old age is particularly common. In 2007, 22% of retired people received less than €500 a month and 29% of them received between €500 and €1,000 a month. Generally speaking, older people show a relative poverty level higher than the average one: families with older people are often unable to afford unforeseen expenses, medical examinations and adequate home heating, according to the Italian National Institute of Statistics (ISTAT).

Many of the indicators for social exclusion in general refer to older people, who indeed belong to the poorer and mostly disadvantaged categories: with housing unease, difficulties in using services, often ill, with scarce familial support, alone and widowed, low education level and often with mental disorders.

#### *National strategy targeting elderly people and social exclusion*

The main national measure targeting poverty among older people is the social allowance. This is a charitable service from the National Insurance Institute (INPS) divided into 13 monthly grants to citizens older than 65 years with no income or with an income lower than the level fixed by law. The 2009 annual minimum income level was €5,317.

People over 65 years of age without an income are given €409 monthly, whereas those whose income is lower than the minimum fixed by law each year receive the difference between €5,317 (the total of 13 monthly grants) and their personal income. A married older person can get up to double the foreseen amount (€10,635) including the spouse's income in the foreseen calculation.

Older people receiving the social allowance may also have a right to an extra social payment, a measure for disadvantaged people introduced in 2002. It is a way to increase the social allowance to €594 a month. This second measure is accessible to citizens who are at least 70 years old (the age limit can be lowered to 65 years, in the measure of one age-year for each five years of taxes).

The Social Card was introduced in 2008. It is a type of credit card, financed by public funds and private donations and distributed by the Italian Post Service, which allows poorer citizens the right to purchase goods in agreed businesses or to cover their public services bills. The measure allows holders of the card to spend €40 monthly. Those entitled to the card include over 65 year-olds and children younger than three years whose families have a very low income.

In addition, there are other measures for people with a low income that are not age-related such as bonuses for special expenses, the national fund for non self-sufficiency (*Fondo nazionale per la non-autosufficienza*) or the minimum inclusion income (*reddito minimo di inserimento*, RMI).

### Older people in volunteering

The importance of older people in the new set-up of volunteering has grown significantly. While in the 1980s governmental policies considered older people mainly as receivers of health and social services, starting from the 1990s the attention has shifted to how older people use their free time: a variety of recreational initiatives were introduced to encourage older people to become ‘social actors’ – that is, they focused on subjects able to renew the interests of older people and to build new relational and communicative processes. In the current social policies, older people are considered a valuable resource for society. In fact, in recent years, a growing number of older people have been volunteering, and this underlines how much they wish to age actively and to contribute to building a joint community. Older volunteers (aged 55 years or more) number about 50% of all those volunteering in the social services and they account for less than one third of those operating in the health sector, and more than one third of those engaged in culture and recreation.

Summing up the older volunteers’ characteristics, it can be said that:

- they are mainly concentrated in the social services (where 42.5% of all older volunteers are active);
- in general, volunteering decreases from the age of 60 years;
- in older age men are more willing to volunteer than women;
- as in the other age groups, the higher the education level is, the greater the involvement in voluntary activities.

On a daily basis, older people spend less time volunteering than young people, but more time than those who are middle-aged.

A more in-depth analysis of volunteering in later age shows that the proportion of volunteers aged 65 years and more grew from 8.9% in 1997 to 13.5% in 2003, while the share of older adult volunteers (aged 55–64 years) also grew in the same period from 18.3% to 23.3%. This increase is high considering the Italian demographic changes in the age structure: 5.3 older persons in every 1,000 in 1997 were volunteers, against a share of 10.2 persons in every 1,000 in 2003.

The main characteristics of older people’s organisations are that they are long-standing and contain a majority of women. They provide (light) care services, support and social services to a higher extent than other age-profiled organisations, but offer much less emergency assistance, transportation to and from the hospital/doctor and environmental protection. The main beneficiaries of these organisations are older people, so they are intra-generational organisations. It could also be underlined that voluntary organisations that support older people are strongly linked to church structures, and that their volunteers have a lower education level in comparison to the average of all volunteers. Voluntary organisations targeting older people also provide support to poor people.

These voluntary organisations show a low level of professionalism, there are fewer training opportunities and a low availability of facilities. Despite the increasing number of older volunteers in recent years, they can still be considered as marginal within the voluntary context. This is mainly due to the limited Italian capacity for building up a new culture of solidarity, for creating specific age-targeted recruitment programmes, or for motivating as well as providing possibilities for real contributions and participation within organisations.

### Case study: Networking of older people

#### *Content and target*

The measure aims to address the transport, companionship and social relation needs of older people living in the town of Carpi, with a population of about 67,000 people and situated in the province of Modena in northern Italy. It operates through the voluntary lay umbrella organisation ANESCAO (Centre for the Coordination of Senior Citizens' Social Centres and Allotment Gardens) and Catholic Church parish groups.

Actions are carried out according to the networking principle and to optimise the existing services network. The main voluntary activities concern transporting older people to medical appointments, specialist examinations, diagnostic tests and rehabilitation therapies, and well as to go shopping, visit the cemetery and attend recreation activities such as playing cards. Volunteers also help with organising social events for older people in the ANESCAO community centres – these include karaoke, card games, bingo, tea, cabaret shows and movies – and providing domiciliary visits and companionship to older people who cannot leave the home.

The initiative was started by the volunteers themselves. Initially, the volunteers were the main actors, operating as interviewers and distributing questionnaires as part of a survey carried out by the municipal administration, which focused on the needs of over 75 year-old residents in Carpi.

Once the survey was concluded, the Municipality of Carpi could not support the needs identified due to lack of funds. So the volunteers, who during their interviewing activities had become aware of the situation, decided to run the services themselves. 'It was a natural consequence' said one of the activity coordinators. 'It took nearly one hour to hand out the questionnaire; however, older people spent the entire afternoon with us talking about their needs, so we decided to help them because it is natural and spontaneous to support those who are in need.' The survey highlighted three main areas of need among older people: transport, companionship and social relations. All activities are run by 60–80 year-old volunteers.

#### *Involvement and participation*

More than 100 older volunteers are involved, belonging to the ANESCAO community centres and to parishes. Analysing some characteristics of the voluntary group it is possible to state that the measure helps involve older people at risk of social exclusion. All volunteers are older people, many of them over 75 years old, mostly living alone (widowed, divorced or single). Through volunteering they can give their daily life better meaning. The social inclusion of the project recipients is fostered through access to transport, social relations and companionship.

The majority of the users are older than 75 years, most of them are even disabled, living alone, ill, with few social relations, and lacking family and informal help. They have difficulty in accessing services and usually have a low educational level.

The volunteers were trained by local organisations: the Sofia Social Cooperative, the Voluntary Services Centre (*Centro Servizi Volontariato*) and the Natalia Ginzburg Free-Age University (*Università della Libera Età*). The Sofia Social Cooperative also provided the computer software to manage the users' personal information, so that the whole activity

can be recorded and, if needed, networked in order to analyse data on the activity carried out. The measure is not linked to any trade union or employer organisation, but there is a link with the town welfare councillor's office and with some support groups helping older people suffering from Parkinson's disease or who have had a stroke.

### *Results and effectiveness*

From a numerical point of view, in 2009 there were about 9,000 transport interventions, covering travel of about 108,000 kilometres over 8,165 hours; about 120 social events (getting together, social and solidarity gatherings) for about 6,800 participants, with about 850 working hours devoted to the organisation; and about 2,700 domiciliary aids and friendly phone calls involving more than 4,533 voluntary working hours. In addition, group coordinators clocked about 3,800 working hours overall. However, results go far beyond the mere data on working hours. Users' needs are fulfilled, their quality of life improves as does their social involvement due to their increasing relationships. There is a reduced feeling of loneliness and better connections to the town facilities. The positive effects are monitored through the users' personal files, which are updated regularly.

The volunteers' quality of life also improves – they perceive that they receive as much out of their efforts as they give. Moreover, the strong feeling of belonging to a group fosters the successful activation of older people into voluntary work.

Once a month there is a group discussion meeting during which the volunteers discuss their feelings and attitudes to the measure. 'Believing in what one is doing' has created a feeling of cohesion within and between the volunteers. They all share a common vision in carrying out the project's activities. This, the volunteers say, keeps them feeling even younger and makes them not think about their aches and pains.

### *Enablers and barriers*

The measure provides the opportunity to network all eight local community centres and parish groups. This is perceived as an important result, even from a 'political' point of view. As a result of the increased social cohesion, the ANCESCAO association in Carpi, with a membership of 4,650 people, is becoming one of the most popular groups and is most appreciated by public opinion. The project gives older volunteers the opportunity to be trained in their tasks: socio-psychological training courses are organised by the Voluntary Services Centre, more technical training is organised by the Sofia Social Cooperative (such as courses for drivers, on work organisation and networking), and information technology (IT) training is provided by teachers of the Natalia Ginzburg Free-Age University. The main obstacle identified in putting the measure into practice was the lack of funds. Activities are expensive and financing from the Carpi Savings Bank Foundation has been used up. As a consequence, training of volunteers could not take place during the past year.

### *Sustainability and transferability*

The measure started in 2003 when 'The Lighthouse', the first group of volunteers, formed. Later, the project became bigger and involved other newly formed groups – 'The Bridge' and 'The Anchor'. Its expansion was natural and the strongly motivated ANCESCAO association, even though it was short of external funding, decided to auto finance services for older people in order to guarantee them.

Fund-raising activity is ongoing and the Carpi Savings Bank Foundation guarantees a second allocation of funding until 2012; however, the exact amount has not been decided yet. Part of the new resources will be used to restart the training courses for volunteers and to buy some new and more efficient cars.

From the technical and operative points of view, the measure could be transferred to other areas, as long as some basic community characteristics are preserved: a strong solidarity and group sense, some facilities and areas for socialising and getting together, and a lot of good will.

The peculiar characteristic of this ‘good practice’ measure in preventing the social exclusion of older people is the decisive will of the older volunteers to create the measure. This was due to their experience as interviewers during the initial survey. This brought out a strong older volunteer sensitivity, motivation and intense sense of devotion to the local community – elements that allowed older volunteers to create inclusive social processes and paths for themselves and also for the older users.

### Summary

The initiative contributes to reducing the social exclusion of older volunteers, who are mostly alone, as it improves their quality of life. Recipients of the measure are mostly older than 75 years, often disabled, alone, ill, with few relationships, few family and informal supports, reduced access to services and a low educational level. Satisfying the transportation, social relations and companionship needs of these older people fosters their social inclusion.

### Further information

Imola Ferrari, coordinator, ‘The Anchor’ voluntary group

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Rita Gori, coordinator ‘The Bridge’ voluntary group

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## Denmark

### Social inclusion and volunteering in Denmark

#### *Social inclusion in Denmark*

The use of the concepts of social inclusion and exclusion, as well as their measurement is a relatively new phenomenon in Denmark, as well as elsewhere in Europe. Social inclusion has replaced a former political focus on poverty and today it covers a wide number of policies and measures that go beyond mere economic redistribution of means to focus more on active policies for participation in society, in the labour market as well as in other spheres of society.

Based on three representative surveys carried out from 1976 to 2000, 2.3% of Danish society can be considered socially excluded, and the risk increases by age. Among the 60–79 year-olds, 5% are defined as being socially excluded, compared with 24% of those aged 80 or more.<sup>1</sup>

The surveys highlight the dynamic processes of social inclusion and exclusion and show that Denmark has witnessed a remarkable increase of about 50% in social inclusion since the mid 1970s, especially among older people, particularly those aged 60 years or more. For the 60–69 year-olds, the main increase took place in 1986–2000, and it is assumed that the change is related to the increased importance of health status.

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<sup>1</sup> The study is based on three surveys conducted among representative samples of 5,166 persons in 1976, 4,561 persons in 1986 and 4,981 persons in 2000; 2,335 persons participated in all three surveys.

The surveys also document that despite the increase in social inclusion among older persons in Denmark, they are still more likely to be excluded than younger people in terms of social relations, professional and political activities, leisure activities and health status. Whereas 17% of the total adult population can be considered excluded in terms of social relations, this increases to 24% among the 60–69 year-olds, 35% among the 70–79 year-olds, and more than half of elderly people over 80 years old report that they have few or no social relations (53%). This may, however, not be associated with loneliness, as other reports have documented. Whereas 15% of the elderly 67–82 year-olds in Denmark can be considered to be emotionally lonely (defined as being alone despite the wish to be with other people), most of these have been in contact with children, family or friends within the past week (13%) and only few can be considered socially isolated (2%). Loneliness is not a static situation either. Most elderly people who at one time report they are lonely later seem to grow out of the loneliness. Only 6% of them report being lonely over time. Nevertheless, there is a link between social isolation and other problems, as loneliness seems to hit especially those who are physically, mentally and socially frail.

Older people in Denmark are also more likely to be socially excluded in terms of professional or political activities than younger generations. Whereas 15% of the total adult population is excluded, in terms of age this includes 13% of 60–69 year-olds, 25% of 70–79 year-olds, and 45% of the 80–93 year-olds (Larsen, 2004). However, this inactivity may relate mainly to professional activities, as other studies show that elderly people are often active members of political parties where they are highly overrepresented, making up 40% of all members. Older people are also overrepresented among voters.

When it comes to leisure activities, again older people are more excluded in Denmark, with 11% of the total adult population hardly ever or never participating in leisure activities, while the proportion is 17% for 60–69 year-olds, 30% for 70–79 year-olds, and 57% for 80–93 year-olds.

Finally, older people are, not surprisingly, at higher risk of being socially excluded due to poor health than younger generations. Whereas 7% of the total adult population can be considered excluded in terms of poor health status, this proportion amounts to 10% for 60–69 year-olds, 18% for 70–79 year-olds, and 32% for 80–89 year-olds (Larsen, 2004). Poor health in general seems to be the triggering factor for social exclusion; moreover, social exclusion is often associated with poor health.

Conversely, elderly people are more likely to be in a better position than younger people in terms of economic and material well-being. Whereas 8% of the population in general can be considered relatively poor, in terms of economic poverty and deprivation, this proportion is decreasing by age and it is only 4% among the 60–69 year-olds, 6% among 70–79 year-olds, and 8% among 80–93 year-olds (Larsen, 2004). Poverty among younger people is, however, often a transitory state as many are students or first-time job-seekers, whereas poverty among older people is less dynamic, as their incomes are less likely to vary to the same degree over time.

### *Volunteering of older people*

Voluntary organisations play a vital role in Danish society. Despite the expansive role of the public sector in the Nordic countries, there are many associations and the average number of memberships per head of population is very high in Denmark as well as in the other Nordic countries. Voluntary organisations span from being small associations with only few members, to large-scale, national and professional organisations.

With regard to elderly people, there is significant variation in activities, levels of professionalism and organisational forms of voluntary work for this user group, ranging from associations running independent and non-profit nursing homes based on an idealistic or religious foundation, to pensioner associations and individual volunteers. The participation of older people in voluntary activities is considered an important contribution to society but indeed also to

themselves. However, older people are less likely to be active in voluntary activities than the rest of the population. In terms of age, the likelihood of volunteering peaks at the age of 40 years and then decreases. Among the over 66 year-olds, 25% participate in voluntary activities and, more often than for younger people, they are active within an association or organisation. Elderly people are especially active in activities related to social and health care, as are groups considered to be less resourceful, such as those with lower education and outside the labour market. Those who are aged 60 years or more and who are active in volunteering work on average 18 hours a month. They are slightly more likely to have been encouraged to become a volunteer than younger people; one reason for this might be that they have a better network of former colleagues, for example.

In terms of non-participation, fewer elderly than younger people report lack of time (42% among people aged 66 years or more, vs 75% among 30–49 year-olds), but older people are more likely to state a lack of interest (21% among 66+, vs 15% among 30–49 year-olds). However, in general, the level of education is a decisive factor for lack of interest. The higher the level of education, the less likely respondents are to state that they are not interested in voluntary work, and older people in general hold a lower level of education than the rest of the population. In the analysis, poor health in particular proved to be decisive for non-participation: 54% of the over 66 year-olds reported poor health status as a reason for non-participation, vs 11% among 50–66 years-olds.

Overall, what appears to be decisive for the participation of elderly people in voluntary work seems to be the means of participation, opportunity structures, individual interests and preferences, and the context. The means of participation include the individual resources, particularly with regard to health, which especially seems to determine whether older people can actively participate in voluntary work. However, opportunity structures also seem to be important. For elderly people, the institutionalised setting seems to be important in that most are performing voluntary work as part of an association or organisation. Individual interests and preferences are equally important and can differ across the life course, according to the available resources and the life situation in terms of, for example, family, work and network. Older people in Denmark are more often engaged in voluntary activities related to social and health issues, and this outcome may simply reflect their interests in this sphere. But it should not be dismissed, as it may be related to their generally lower participation in other spheres of society, as reported in the analysis of social exclusion. Their lesser voluntary engagement in leisure and political activities should also be analysed in relation to their greater likelihood of being considered socially excluded in these spheres. It is also worth noting that an interest in voluntary work seems to depend on patterns of learning among family members who have been involved in volunteering, and elderly people can play a role in inspiring other family members to get involved. Finally, the context is important in determining the policy and funding framework, but also the norms associated with voluntary work. Contrary to intuitive assumption, however, it seems that an extensive welfare state does not lead to lesser involvement in voluntary activities, and active participation does not seem to be an individual reaction to a poorly performing welfare state.

### **Case study: ‘Elderly helping elderly’**

#### *Content and target*

‘Elderly helping elderly’ (*Ældre hjælper ældre*) or ‘Well-being of the elderly locally’ (*Ældres trivsel lokalt*), as the project was re-named in 2003, aims to combat and prevent loneliness among elderly people, by supporting the weakest among them through the involvement of other more resourceful older people.

The project started up in 1996, by means of funding from the Ministry of Social Affairs. In 1999, the project received €1.4 million (DKK 10 million) from the ministry. In 2000, national funding was reduced, and local funding was encouraged. In 2003, the project again received national funding from the ministry of €4.7 million (DKK 34.4 million) and in 2007 funding was continued with €2.4 million (DKK 17.4 million) for the period 2007–2011.

The target group for the project is elderly people aged 60 years or more, both the weakest elderly people but also the more resourceful, in preventing them from becoming lonely in the long run. The project builds on the idea of equal relationships between users and volunteers and aims to strengthen empowerment among the elderly volunteers, which not only ensures that they participate in this project but also feel encouraged to take up other volunteer activities.

The project is organised by the national association Mobilising Elderly (*Ældremobiliseringen*) and is its largest volunteer project. Mobilising Elderly is a national cooperation between a number of pensioner associations, working with policy questions related to the elderly. Membership of the associations or Mobilising Elderly is not necessary for participating in the project.

Overall management, coordination, supervision, reporting and information are carried out by professionals, who are employed centrally and locally in the project, but volunteers are engaged in all tasks that concern the local project, as well as being directly involved in providing support for less resourceful elderly people. All new groups must go through five phases: preparation, start-up, establishment, maintenance and development. In the project, courses for volunteers were set up, so that volunteer groups could operate on their own, without professional intervention, once they were set up.

By 2007 there were 65 activities mainly focused on socialising, assistance and exercising, all provided by elderly volunteers. Most users make use of the visiting services, where a volunteer comes round on a regular basis (43%). Many users also receive help with practical tasks (31%), or exercise together with the volunteer ('chair exercise' 13%, walking 17%, exercising with friends 5%). Some use accompanying services (8%), reminiscence workshops (5%) or other activities (16%) – including a reading service, card games, telephone network, computer skill activities or shopping services.

It was stated from the beginning that the activities were to be seen as a supplement to already existing municipal activities, and not a replacement for these. However, some activities, such as the shopping service, also come into existence because the social services are thought to be inadequate.

### *Involvement and participation*

There were 94 volunteer groups in 1998 and this had increased to 264 in 2006. In 1999, volunteer groups covered 125 out of the total 198 municipalities and by 2006 135 municipalities hosted local projects. By 2011, it is hoped that the project will cover the whole country.

The number of volunteers has increased from about 1,500 in 1998 to about 3,500 in 2006. Volunteering on average took up five hours a week in 2005 and in total made up 24,500 hours weekly, or the equivalent of approximately 605 full-time positions.

Users' perspectives were the focus of the evaluation conducted in 2007. A questionnaire sent out among 225 users received a 60% response rate. By then, the number of users was 9,147 (2006) and the activities seemed to reach especially those who otherwise were not receiving any kind of volunteer help, which was one of the overall goals of the project. Some 79% of users only received voluntary support from this project. The project also aimed to reach out to those who felt lonely. Not all users, however, were among the most vulnerable, with only 31% of users stating that they felt lonely before they became involved in the project.

Most users had become aware of the project through their friends or neighbours (32%), their home helper (21%), the yearly preventive home visit offered by the municipality (14%) or an advertisement in the local newspaper (14%), while

8% were informed by their family (the remainder gave no answer or cited another source). This led Mobilising Elderly to conclude that more efforts should be made to ensure that the home services publicise the project.

Companionship was the main reason for users' request for services, with 54% of users stating that this was the main reason for their joining, followed by feeling safe (27%), for the fun/challenge/experience of new things (27%), getting out of the home (23%), for exercise (16%) or networking (13%) (the remainder gave no answer or cited another reason).

### *Results and effectiveness*

Funding from the Ministry of Social Affairs required an external evaluation of the project and in 1999 the first in a row of evaluations was carried out. Findings suggested that there was general satisfaction with the project both among users and volunteers, and that the project had even encouraged some of the weaker users to join up as volunteers.

An evaluation among volunteers in 2005 showed that 76% of men and 73% of women active as volunteers stated that volunteering in this project had encouraged them to become actively involved in other activities. In fact, 52% of men and 60% of women were active in various forms of voluntary work. Most of them had been part of the project for a long time, on average five years and six months for men and four years and four months for women, which could be interpreted as an expression of satisfaction with the project.

When asked about their motivation for volunteering, 95% stated that their main motivation was the joy of helping others; 83% stated that volunteering gave them meaning in life; 64% said that they gained new friends; and 45% stated that it was a good way to spend their energy. In this way, the goal about reciprocity seemed to have been reached.

In the user evaluation in 2007, 85% of users graded the support as being 'very good'. Overall, 76% of users felt that their quality of life had increased due to being part of the project, and 34% felt that their health had improved (51% felt no health improvement). Among the users who had felt lonely before they became involved in the project (31%), 74% of them felt that they were less lonely now.

Overall, 76% of users said that they had experienced an increase in quality of life by participating in the project and 82% felt that they themselves often gained from being part of the project.

### *Enablers and barriers*

National and local funding involving a national volunteer organisation and professional management has led to the wide implementation and success of the project.

One of the problems that seems to arise is that it appears to require extra effort to keep up the motivation and drive among volunteers engaged in already established groups once they have been operating for a while. The evaluation of the project by volunteers also showed that they felt that little was done for those volunteers who left the project; one reason for this may be that the organisation of the group was often fragmented and left little opportunity for getting to know other volunteers (Ældremobilisering, 2005).

### *Sustainability and transferability*

The project has been running from 1996 onwards. The current funding covers the period until 2011. The project has successfully expanded and is now covering 70% of the country. The potential for transferability seems to be high. One contributing factor may be the central coordination and management, which can make the transfer of knowledge easier.

### *Summary*

The project seems to contribute substantially to reducing social exclusion among the most vulnerable elderly people as well as preventing the more resourceful older people from becoming socially excluded in the long run. Problems pointed out by the organisation are the fragility of the relationships being created and the little opportunity for volunteers to network.

### **Further information**

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<http://www.aeldremobiliseringen.dk>

# Interim lessons to be learnt

# 4

The main target of this project is to look closer at volunteering of older people at risk of social exclusion primarily at community level with the aim of determining if and to what extent volunteering can represent a suitable measure for reducing or preventing social exclusion. Thus, independent from a heterogeneity in old age in terms of potential contributions and resources, a range of risk factors such as age, health status, household type or environmental factors have been identified, which especially when accumulated can lead to social exclusion of older people. It is not surprising, therefore, that volunteering among groups at risk is much less likely compared with other groups of older people. Analysing the benefits of volunteering for the individual and society, it can be concluded that volunteering has the potential to promote social inclusion for those who are affected by the risks mentioned and at the same time can ensure, following the main principles of active ageing, that all groups of older people should take on an active role in society.

## Barriers to and promoters of volunteering – an interim evaluation

The reports from the countries participating in the project reveal several relevant factors for promoting as well as impeding social volunteering among the higher age groups and the involvement of elderly persons at risk of social exclusion. To some extent, these factors also apply generally to the voluntary work of senior citizens as a whole. Firstly, these reports confirm existing empirical findings, according to which older people with fewer economic resources, a lower level of education and a poorer state of health are less represented among volunteers and vice versa. Particularly, age seems to set natural limits. Accompanied by increasing health restrictions, the individual scope for volunteering becomes more limited. As a consequence, less volunteering is reported among members of the higher age groups. This is particularly true for over 75 year-olds.

Against this background, it becomes clear that recruitment of new volunteers is highly dependent on social networks and social capital, and an already existing access to the voluntary sector is crucial. This represents a major challenge as older people at risk of social inclusion are less likely to be interested in and become involved in voluntary work on their own initiative as well as being less likely to be asked to volunteer.

Volunteering in old age and respective volunteering structures are highly dependent on active, highly motivated and committed individuals who act as promoters of long-term commitment. These persons usually belong to groups that have sufficient resources and networks at their disposal to initiate and provide constant support to projects. In this context, it is also important to mention that volunteering is often related to the personal experiences and is rarely taken up for the first time after retirement. Again, this emphasises that recruitment and individual motivation represent a particular challenge. In this context, succession and finding new leaders is also an important aspect.

Further barriers concern the structural-organisational level. However, these again are not specific to older people at risk of social exclusion but hold true for elderly people as a whole. This most notably applies to a lack of funding and established support structures (such as facilities and basic funding). However, this means that a secure core funding is of great importance, not only to maintain the infrastructure for volunteering but also to motivate the persons involved. This is much more important for older people at risk and therefore should be strengthened among this group. In consequence, it appears that spending too much time asking municipalities for small sums of money can act as a strong ‘de-motivator’ particularly for the group concerned.

Barriers like those mentioned affect all initiatives in the countries involved. However, there are also certain obstacles reported that are based on the heterogeneity and specific conditions of volunteering structures in the observed countries.

In Poland, for example, lower volunteering rates among older persons in general can be seen as a consequence of having no tradition of working for NGOs. Thus, voluntary work in old age cannot be influenced by people’s previous experiences, and cannot be regarded as a ‘natural continuation’ of having carried out this type of work in the past. In

most cases, volunteering has to be taken up from scratch. Because of a relatively worse health status, a restricted economic situation and low educational attainment among the older generation (those aged 75 years or more) in Poland, the target group this report deals with consists of passive receivers of support who would require a more long-term and expensive process of social integration than persons who can easily be integrated. As a result, in this group there are not enough potential leaders and other persons who could serve as driving forces.

### Lessons from good practices

Findings from the case studies illustrate the benefits and positive effects of volunteering both at individual and societal level. Social integration, development of new social relationships and mutual support structures are reported by members of volunteer groups. Volunteering offers older people the chance to widen their social networks on which they can fall back in case of need. This prevents social isolation and loneliness and stimulates self-determination and a more independent outlook on life. In addition, better recognition, gaining self-esteem and having a higher feeling of belonging to society are seen as further important outcomes.

As recruitment is essential, these positive outcomes can be used for motivational purposes when it comes to finding new volunteers. With respect to the target group of this project, special enabling factors are mainly identified in the areas outlined below.

- A low threshold for older people to join activities and easy access to voluntary organisations are necessary, which can be realised for example by creating an open and welcoming atmosphere.
- Measures and initiatives should be embedded in the country-specific dominant traditions and general culture of volunteering. Very often they are also strongly connected to local traditions. Recruiting, motivating volunteers and creating new measures require close reflection on these specific conditions and also the involvement of the networks and organisations (welfare organisations, religious institutions) that operate in the local environment of volunteers. This emphasises the importance of the local level and the integration of measures in the community.
- It is important to offer possibilities for flexible ways of participation (for example, short-term projects or clearly defined, manageable tasks). Offering flexibility is also a way of persuading people to become active. This is especially important for the target group in this project, who might not commit right away to long-term activities.
- Further enabling factors are voluntariness, independence and self-determination; particularly, the link to self-development is very important.
- Gaining new skills and competences (using computers, improving social competences, awareness of new legislation) is a further factor of success.
- Esteem and recognition are important for a (longer) commitment to voluntary activities. With regard to this, it is also important for a project/initiative to offer possibilities for contributing experiences and further developing one's talents. This can keep people motivated.
- Basic (financial) support from institutions and municipalities as well as effective cooperation from stakeholders at the local level are required if initiatives and measures are to be sustainable.

## Conclusions

Analysing the relationship between social inclusion and volunteering among older people, this report shows that volunteering can in fact be a suitable measure to reduce the risk of or prevent social exclusion. For older people exposed to the main risk factors such as old age, health restrictions or isolation, volunteering can lead not only to involvement in activities but also to a better integration and inclusion into society.

Volunteering in all generations plays an important role in the political agenda of the European Union and the Member States and is regarded as crucial for the cohesion of societies. But it varies widely against the background of different historical, cultural, socioeconomic and political conditions. These conditions have a strong impact on political programmes and volunteering strategies. The type of welfare regime, the level of economic development, as well as the state of development of the civil society all play an important role in voluntary participation. Thus, the degree of older people's involvement in voluntary activities varies in the different EU countries, with a north-south gradient showing the highest rates of engagement in northern Europe. In view of the fact that older volunteers usually belong to groups with a lot of resources, it is not surprising that more vulnerable groups are underrepresented in volunteering activities. But with regard to the positive effects of volunteering, not only individuals but the society as a whole would benefit from an increasing rate of volunteers among older people at risk of social exclusion and this could make an important contribution to the social cohesion of society.

The case studies presented reveal opportunities to realise this target and show how measures can prevent isolation, lead to social integration and at the same time provide the opportunities to gain health benefits and develop competences. Nevertheless, the case studies illustrate that this cannot be taken for granted and that special conditions have to be considered. On the one hand, a larger number of vulnerable groups are found in the higher age groups, where physical limitations can set 'natural' limits to volunteering activities. This is especially reported for the new EU Member States, where life expectancy is also significantly lower. On the other hand, recruiting volunteers in general is a challenge because those groups often did not participate in volunteering activities along their life course and usually are not endowed with the resources that serve as a precondition for taking up voluntary activities. This means that there has to be special forms of addressing these groups, as well as personal contacts which help to motivate older people, thereby enabling a threshold low enough for older people to join activities and connecting these activities to personal experiences, competences and the local environment.

Additionally, active voluntary work correlates with levels of education, family (or economic) status and household income. As a consequence, personal resources have a strong impact on volunteering and, in addition, elderly people at risk of social exclusion are underrepresented in voluntary activities, not only as recipients but especially as active agents in measures, initiatives and projects.

Members of voluntary organisations often point out 'that people need to be able to participate in different ways according to their interests, capabilities and available time at different stages of life'. As a consequence, changing patterns in the forms and activities of volunteering emerged during the last decade, including a shift from volunteering in activities with a bigger sense of obligation and commitment to a higher engagement in short-term activities. Strategies to promote volunteering in old age should take this development into account and deal with the fact that a greater availability of time after retirement does not necessarily correlate with a general obligation to invest it in volunteering.

The sense of social connectedness and belonging to the community is strongly promoted by volunteering: increased social contacts, a better social awareness as well as the development of competences for further active societal participation again document the benefits of volunteering. It can also be assumed that changes in self-perception and

self-esteem as a result of new competences and life skills (empowerment) lead to more active participation in the community and in society at large (Greenfield and Marks, 2004; Harlow and Cantor, 1996)

Even if there is a lack of empirical data on older people at risk of social exclusion in particular, available studies that focus on other disadvantaged groups or minorities (unemployed people, those affected by poverty or ethnic minorities) tend to confirm these findings (Institute for Volunteering Research, 2004).

According to the findings, volunteering is a suitable measure to combat feelings of personal isolation. Because of its focus on skills and personal development, promotion of self-worth and self-confidence as well as making a contribution to society, it can help to empower individuals. Overall, 'by providing services, in many cases to socially excluded groups, by challenging stereotypes, and by bringing people from different backgrounds together, volunteering was having a wider impact on the symptoms and causes of social exclusion' (Institute for Volunteering Research, 2004).

But, on the other hand, these positive findings should not obscure the fact that volunteerism can also deepen the social divide, since – as mentioned above – people who do voluntary work for the most part rank among those with a higher income, a higher education, more social resources and who take care of disadvantaged people. In this regard, the criticism is often levelled that volunteers do not always have the necessary qualifications for working with disadvantaged groups, which can lead to a stronger accentuation of the social differences in communication.

Against the background of the main risk factors, especially with regard to the lack of social participation, these mainly positive findings suggest that volunteering can represent a suitable measure to prevent or reduce social exclusion. Voluntary activities can have a positive effect on:

- preventing the feeling of isolation, which is often considered one of the most serious problems in connection with social exclusion;
- improving the individual health status, identified as one of the main risk factors for social exclusion;
- building up new contacts and social networks that can provide social support and can be seen as a precondition to promote social inclusion into society as a whole;
- developing new skills and competences at both the individual and societal level (the public sphere) that can ease access to social services;
- (re)gaining new confidence and self-esteem through personal development and (public) recognition of one's work and activity.

## Key messages for policy

### Recommendations for governments

- Against the background of demographic change, the volunteering of older people, and its irreplaceable value for a vital voluntary sector and for the cohesion of society as a whole, should be more recognised.
- Strategies and programmes to promote and strengthen the voluntary sector should focus more on motivating and integrating new groups of older people (such as vulnerable groups and people at risk of social exclusion).
- As these groups do not belong to the classical target groups involved in voluntary activities, special conditions often represent barriers to volunteering. In view of this, motivation and recruitment, low thresholds for entering volunteering activities, as well as opportunities for developing skills and competences are regarded as crucial.

- Encouraging more older people to volunteer and making it easier to contribute should not lead to the devaluation of professional work. This also means that campaigns to promote volunteering should find the balance of sensitively focusing on individual and societal benefits, recognising the economic value of volunteering and avoiding instrumentalisation.

### Recommendations for municipalities and local authorities

- Basic support from institutions and municipalities is crucial for maintaining volunteering structures. They play an important role in enabling and supporting initiatives by developing support structures, providing space, offering public relations and providing basic financial support.
- Effective cooperation between stakeholders at the local level is required if initiatives and measures are to be sustainable. Municipalities have a core position in networking processes and can offer platforms for exchange and moderate discussions between stakeholders.
- As municipalities play an important role in providing support and services at different societal levels, they also have good access to various vulnerable groups.
- Efforts to motivate and recruit new volunteers among older people at risk of social exclusion should use existing structures and organisations that already take care of and have experience of social exclusion in general.
- The promotion of volunteering is and will be an important task for municipalities in order to ensure quality of life. This also requires more competences of the public administration for integrating these efforts into an overall strategy to promote social inclusion and to meet the challenges of an ageing society.

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*Feeling isolated is an experience common to many older people and is regarded as one of the most serious problems in connection with social exclusion. Participation in volunteering can help build new contacts and networks thus preventing or reducing social exclusion among older people. This study looks at the framework conditions that can encourage older people's participation in volunteering. Five countries, Denmark, Germany, Italy, the Netherlands and Poland, are examined. For each country, background information on initiatives to combat social exclusion of the elderly and the role that volunteering plays in these strategies are provided. Three case studies of successful initiatives are described for each country with the aim of identifying success factors for – and obstacles to – volunteering by older people. The report concludes with policy pointers for national governments, municipalities and local authorities.*

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