



# **Transnational Review of Innovative Practices of Housing and Care Solutions for Elderly and Vulnerable People in Central European Cities – WP3**

**This project is implemented through the CENTRAL EUROPE Programme co-financed by the ERDF**

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# Structure of presentation

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- ➔ Overview of past research
- ➔ Research goal
- ➔ Scope of research
  - » Comparison of housing systems and housing policies
  - » Overview and comparison of contextual factors
  - » Elderly housing attitudes and living conditions
  - » Description of 10 innovative practices
  - » Evaluation of 10 innovative practices
  - » Description of process of application of 5 best innovative practices
  - » Management of 5 best innovative practices
- ➔ Time schedule
- ➔ Discussion



# Overview of past research

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- 3 basic topics: (1) demographic change & housing systems; (2) ageing & ICT in home environment; (3) ageing, health & social care.
- **Past research projects:**
  - » **FELICIE:** Future elderly living conditions in Europe (EU FP 5; 2003-2005)
    - Goal: recommendations concerning the adaptation of family and elderly policies
    - Demographic forecast till 2030. An estimate of the future demand for nursing homes, analysis of both formal (institutional) and informal care and other elderly-specific needs
  - » **ENABLE-AGE Project.** Enabling Autonomy, Participation, and Well-Being in Old Age: The Home Environment as a Determinant for Healthy Aging (EU Framework Five QLKG-CT-2001-00334; 2002 - 2004)
    - Goal: examination of home environment and its importance for major components of healthy aging and quality of life; especially health and care implications of home environment, recommendations concerning the phasing of movement to institutional care.
  - » **DEMHOW:** Demographic Change and Housing Wealth (EU FP 7; 2007-2011)
    - Goal: Question of the extent to which home ownership provides a potential cure for some of the consequences of ageing populations. Analysis of attitudes toward the acquisition of housing assets and their use in old age.
  - » **Active A.G.E.:** Active ageing, gender and employment policies (EU URBACT ERDF; 2008-2011)
    - Goal: Improve social and health care services that are provided to the elderly. In addition, promote intergenerational solidarity, active ageing, life long education and participation in the life of the community.



# Overview of past research

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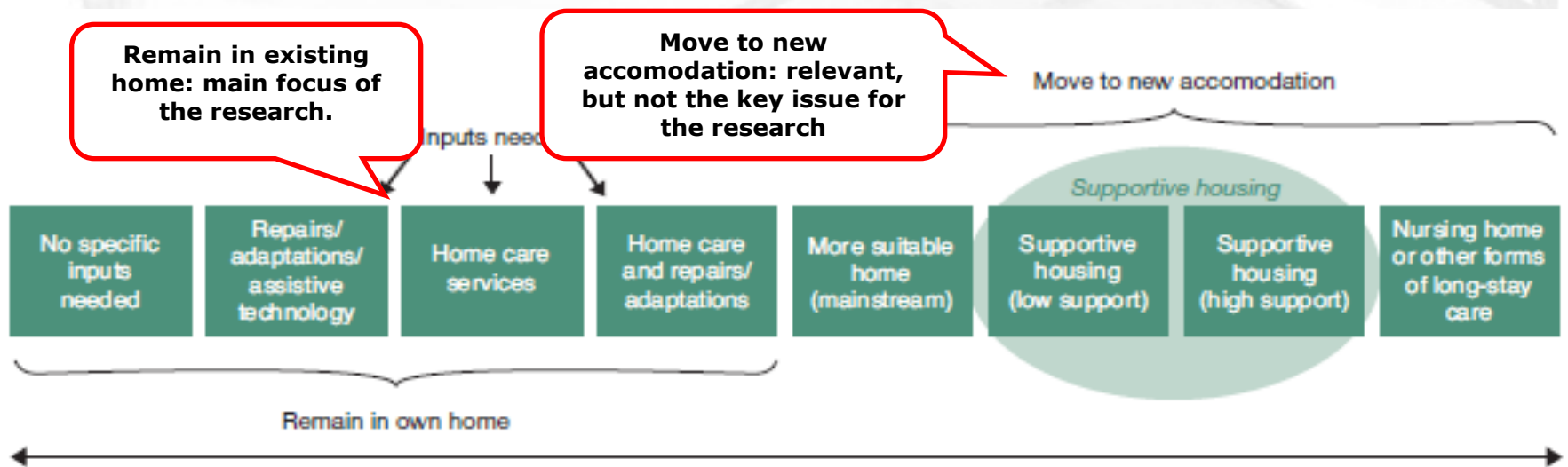
- » **PERSONA:** Perceptive Spaces Promoting Independent Aging (EU FP 6, 2007-2010)
  - Goal: introduce advanced technologies (ICT) to empower the elderly and support them in their efforts to maintain both their independence and a good quality of life. Use of Information and Communication Technologies (ICTs), that can be used to help the elderly remain independent and maintain a good quality of life.
- » **ICT & Ageing:** European Study on Users, Markets and Technologies (EU ICT Policy Support Programme, 2007-2010).
  - Goal: identify existing market barriers that hinder development and use of ICT for independent living and recommend action in order to address older peoples' needs by ICT.
  - Results included: overall view of key aspects of ICT use across Europe and internationally (16 countries plus comparison with US and Japan), overview of ethics-related policies and provisions that have relevance to the use of ICT.
- » **Other ICT & ageing EU projects:**
  - SENIOR (The Social Ethical and Privacy Needs in ICT for Older People: A Dialogue for Roadmap)
  - Soprano (Service-oriented programmable smart environments for older Europeans)
  - Q Aging ...



# Research goal

## Transnational review and evaluation of innovative practices in housing and care for elderly people in Central European cities

- Overview and comparison of contextual factors and housing policies
- Overview and evaluation of innovative practices in housing and care for elderly people
- Recommendations for national policies and transnational programmes



# Research topics

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- Comparison of housing systems and housing policies
  - » Brief housing system and policy overview
- Overview and comparison of contextual factors
  - » Demographics, macroeconomics, social policy, institutions, relevant legislation
- Elderly housing attitudes and living conditions
  - » Secondary comparative data (SHARE, SILC) plus national data analysis
- Description of 10 innovative practices
  - » Detailed description of 2 innovative practices (best, worst) in 5 areas
- Evaluation of 10 innovative practices
  - » Cost/benefit analysis (efficiency)
  - » Effectiveness
  - » Sustainability
- Description of process of application of 5 best innovative practices
  - » Political factors, lobby groups, MP support, EU pressure, active region or municipality...
- Management of 5 best innovative practices
  - » Organization of practices: involved actors, distribution of tasks, contract relations, subsidisation





# Comparison of housing systems and housing policies

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- ➔ **Comparison of :** (1) housing systems and policies in general; and (2) policies aimed particularly at the elderly.
- ➔ Focus (1):
  - » Brief overview of housing policy (1990-2011)
  - » Housing tenure changes, including for elderly (1990-2011)
  - » Housing construction levels (1990-2011)
  - » Housing (mortgage) finance
  - » Recent housing stock: structure, quality, age
  - » Recent role of private renting, owner-occupation and social/public/non-for-profit renting in country housing system (both indicators and description)
  - » Categorization and evaluation of housing system
  - » Main supply-side subsidies in past 10 years (grants, loans, tax subsidies, guarantees)
  - » Main demand-side subsidies in past 10 years (allowances)
  - » Impact of financial (economic crisis) on country housing policy
- ➔ Focus (2):
  - » Brief overview of housing policies and social care for the elderly
  - » Categorization and evaluation of housing policies for the elderly
  - » Categorization and evaluation of social care for the elderly (institutional care etc.)
  - » Role of public, voluntary and private sector in housing and care for the elderly.



# Overview and comparison of contextual factors

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- Focus on the main macro economic as well as demographic factors that may influence housing and care policies for elderly. In most EU countries the populations are aging and shrinking, which causes significant changes to housing systems and policies.
- **Welfare model**
  - » Focus – type of welfare state. Centralized or decentralized social services? Does the organization of social care in the given country enable possibilities of innovations in social care? In what way? What are the opportunities? What are the barriers?
- **Macroeconomic indicators**
  - » Focus - GDP, GDP growth, public deficit and debt
- **Pension systems**
  - » Focus – pension systems (pay as you go; private schemes, mixed schemes), sustainability of pension system
- **Demographic factors**
  - » Focus – time series on age structure of the population and life expectancy (including future projections), family structure, family size, and other demographic indicators (e.g. dependency ratio, natality, divorce). Cohabitation of generations.
- **Legal framework**
  - » Focus – incorporation and integration of concepts as „ageing in place“ in legislation, government strategies, policies. Features of norms, directives, regulations, guidelines etc.





# Elderly housing attitudes and living conditions

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- Emphasis will be put on households' evaluation of their income, views on who should be responsible for ensuring adequate housing and general expectations about the quality of housing in later life
- Focus
  - » **Financial situation of elderly** (average income, sources of income, pensions as share of average salary)
  - » **Housing affordability of elderly** (residual income, housing costs-to-income ratio in different tenures)
  - » **Housing and care preferences of elderly** (mobility, housing satisfaction, housing preferences, expectations and fears, care preferences) Do the elderly prefer professional care to informal (family) care? Do the elderly prefer in-the-home or out-of-the-home care? To what extent do elderly rely on informal care based on the help of family members? How is in the given countries informal care prevalent?
- **SHARE** (Survey of Health, Ageing and Retirement in Europe 50+) –wave 2 (2006), questions about:
  - » Financial situation, savings, pensions, sources of income.
  - » Contact with children/relatives – formal/informal care, type of help received
  - » Health problems
  - » Change place of residence – reasons for moving
  - » Housing situation – tenure, housing affordability, housing as a source of income, physical features of housing (size, accessibility, facilities etc.)
- **EU-SILC** (Statistics on Income and Living Conditions, 2007 and 2011) questions about:
  - » Financial situation / housing affordability of elderly households
  - » Housing satisfaction
  - » Health and social deprivation
  - » Household facilities and equipment



# Description of 10 innovative practices

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- **Research of innovative practices in 5 areas:**
  - » 1. community building
  - » 2. housing accessibility (including technical devices, ICT)
  - » 3. housing affordability
  - » 4. social and health care
  - » 5. access to information/education
- **For each country and each area** description and in-depth analysis of at least one **BEST** and at least one **WORST** innovative practice applied during past **5 years**
- **Overview should include only innovative practices** – not standard policy instruments (those should be included in general policy and contextual overview)
- Identification of **BEST** practices and **WORST** practices
  - » Why was some innovation successful? Key factors.
  - » Why was some innovation unsuccessful? Factors, barriers, policy implications.
- **Literature review:**
  - » Peace S.M., Holland C. 2001. Inclusive housing in an ageing society: innovative approaches. The Policy Press.
  - » Scotts. M., Saville-Smith, K., James. B. 2007. International trends in accessible housing for people with disabilities. Working paper.
  - » CS-HO. Housing Policy and vulnerable social groups. 2007. Council of Europe Publishing.



# Description of 10 innovative practices: community building

➔ **Research will focus on creating of voluntary organizations, day care centers and networks for/among the elderly. There is a wide variety of day centres that combine provision of social activities with advice and social care. Focus will be on community building that involve following:**

» Provision of local day centres/communities for the elderly including

- Education and ageing classes
- Leisure activities
- Befriending service
- Advice concerning practical matters (managing finances etc.)
- Advice and help with home maintenance
- Help after being discharged from hospital care.
- Arranging home visits, services of translators (for minority groups etc.)
- Informal care

» Various combinations and interconnections between these services

» Strategies increasing social inclusion and political participation

» Organization and design of these communities

- Organization – who runs the centres?
- Funding
- Legal aspects

➔ **Literature review:**

- » Evans, S. 2009. Community and ageing: Maintaining quality of life in housing with care settings. Policy Press.
- » Milligan, C. 2009. There's No Place Like Home: Place and Care in an Ageing Society. Ashgate.
- » Kontos, P.C. 1998. Resisting institutionalization: Constructing old age and negotiating home. Journal of Aging Studies 12:2, 167-185.
- » Fyfe, N. and Milligan, C. 2003. Out of the shadows: Exploring contemporary geographies of the welfare voluntary sector. Progress in Human Geography 27(4): 397-413



## Description of 10 innovative practices: housing accessibility

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- ➔ This section will focus on concrete architectural tools, that are designed to improve housing accessibility for the elderly. The research will focus on adaptations that range from small repairs to universal schemes:
  - » Home maintenance and security
    - Small repairs that improve security (alarms), insulation, heating etc.
  - » Adaptations
    - Improving moving around the house (ramp, rails), stair lift or adapted bathrooms and kitchens.
  - » Life-cycle concepts – universal design, lifetime housing
    - Houses built in such a way, that are suitable for all generations; for all phases of life cycle (after minor adaptations).

### ➔ Literature review:

- » Pleace, N. 2011. The Costs and Benefits of Preventative Support Services for Older People. The Centre for Housing Policy. York.
- » Robson, D., Nicholson, A., Barker N. 2005. Homes for the Third Age. Taylor & Francis. London.
- » Milner, J., Madigan, R. 2004. Regulation nad Innovation: Rethinking Inclusive Housing design. Housing Studies 19(5): 727-744.
- » Imrie, R. 2006. Independent lives and the relevance of lifetime homes. Disability & Society 21(4):359-374.
- » ICT and Ageing. European study on Users, Markets and Technologies. Final report.



# Description of 10 innovative practices: housing affordability

- ➔ This section will deal with innovative financial tools, that make housing for the elderly more financially affordable.
- ➔ Research will focus on the **following range of financial** (supply side, demand side) tools:
  - » housing allowances
  - » housing allowances for informal care providers (friends, family members)
  - » housing allowances for the targets of care to enable them to purchase informal care
  - » tax credits
  - » vouchers and grants
  - » insurance based medical benefit entitlements
  - » care insurance products
  - » mortgage interest deductions
  - » use of housing equity by the elderly - reverse mortgages
- ➔ **Further information about these tools:**
  - » Administration
  - » Criteria
  - » Adequacy of finances offered
- ➔ **Literature review:**
  - » Pleace, N. 2011. The Costs and Benefits of Preventative Support Services for Older People. The Centre for Housing Policy. York.
  - » Scotts. M., Saville-Smith, K., James. B. 2007. International trends in accessible housing for people with disabilities. Working paper.
  - » CS-HO. Housing Policy and vulnerable social groups. 2007. Council of Europe Publishing.



# Description of 10 innovative practices: social and health care

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- In this section, the research will focus on how social and health care is organized in the case of elderly and whether there are any innovative practices in this sense. The key question will be, to what extent is social and health care institutionalized and what assistance is there for the elderly who decide to live in their own home.
- Evaluated will be the existence of the following innovative practices
  - » Warden services
    - Use of alarms that in case of emergency call ambulance/services etc.
  - » Use of technologies (ICT) for the elderly: telecare, telemedicine, SMART schemes, etc.
    - Telephone/camera linked to operators located away that can call older person to check his status, discuss problems, issues etc.
  - » Floating support services - Social service help with managing finances, advice about housing related matters, supervision.
    - Help, advice and support in managing finances, information about housing and related matters, help with accessing medical care.
- **Literature review:**
  - » Mort, M., Milligan, C., Roberts, C. and Moser, I. 2008. Ageing, technology and home care: new actors, new responsibilities.
  - » Pleace, N. 2011. The Costs and Benefits of Preventative Support Services for Older People. The Centre for Housing Policy. York.
  - » Peace S.M., Holland C. 2001. Inclusive housing in an ageing society: innovative approaches. The Policy Press.
  - » Joseph Rowntree Foundation. 2004. From welfare to well being – planning for an ageing society. Conclusions of the JRF Task Group on Housing, Money and Care for Older people. York: Joseph Rowntree Foundation.
  - » Bayer, S., Barlow, J. and Curry, R. 2007. Assessing the impact of a care innovation: Telecare Systems Dynamic Review 23(1): 61-80.





## Description of 10 innovative practices: access to information

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- ➔ In this section the aim will be to analyze, to what extent are the elderly informed about opportunities/services open to them and the barriers that hinder access to them.
- ➔ Evaluated will be following practices:
  - » Existence, use and access to specialized internet webpages that focus on information provision to the elderly (especially informing about rights of pensioners and social services).
    - Webpages such as <http://www.housingcare.org/> (U.K.). Provide information about housing, social care, health etc. Who runs them, what information does it contain?
  - » Involvement in communities and organizations for the elderly
    - There are (U.K) specialized elderly organization that provide advice for elderly about possibilities for gaining benefits, accessing grants to fund house repairs.
  - » Municipality (or local level administration driven) activities, such as seminars, meetings to improve knowledge of the elderly about options in housing, health care and social care.
- ➔ **Literature review:**
  - » McCallion. 2007. Housing for the Elderly. Policy and Practice Issues. Routledge.
  - » Evans, S. 2009. Community and ageing: Maintaining quality of life in housing with care settings. Policy Press.
  - » Peace S.M., Holland C. 2001. Inclusive housing in an ageing society: innovative approaches. The Policy Press



# Evaluation of 10 innovative practices

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## ➤ General criteria of evaluation:

- » **Efficiency - comparing the effective cost with the benefits of the programme, financial sustainability**
- » **Effectiveness – well targeted to those in need, sufficient to satisfy the need**
- » **Transparency - cost and the benefits visible, clear allocation rules, no abuse**
- » **Administrative simplicity**
- » **Target group acceptance**
- » **Key factors and obstacles in the implementation**

## ➤ Examples of indicators

- » Distribution of subsidies
- » Assessment of criteria for the eligible target group
- » Cost of administration
- » Overall costs (in a given period)
- » Savings of the innovative practice – time needed to recouple the investment compared to the standard practice
- » Evaluation of negative effects
- » Sustainability in terms of central/local government finances
- » Flexibility (also in addressing possible future needs)
- » Adequacy of financial assistance offered – is it enough?
- » Matching of client need vs. practice/modification used
- » Integration with other relevant policies (social care, health care)
- » Participation in the programme, clarity and understandability by the eligible group
- » Behaviour of the target group – acceptance of the measure
- » Continuity of the programme
- » Piloting of the practice (existence of piloting studies)

## ➤ Literature review:

- » Lansley et. al. 2004. Adapting the homes of older people: a case study of costs and savings. *Building Research and Innovations* 32(6): 468-483.
- » Lansley et. al. 2004. Can adapting the homes of older people and providing assistive technology pave its way? *Age and Ageing* 33: 571-576.
- » Tinker, A., et.al. 2004. At Home with AT: Introducing Assistive Technology into the Existing Homes of Older People – Feasibility, Acceptability, Costs and Outcomes.



## Description of process of application of 5 best practices

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- ➔ Ways of developing and promoting of innovative practices in elderly housing. Research in the given countries will especially focus on strategies of organizations and interest groups on designing and targeting the innovative practices:
  
- ➔ **How was it achieved that innovative ideas were employed by public policy and put into effect?**
  - » E.g. There are regulations for all new housing, requiring innovative accessibility features. For example London Plan Policy - ensure that all new housing in London is built to universal design Lifetime Homes standards. How was this achieved?
  
- ➔ **What strategy of implementation was successful? Why? How do NGOs and other voluntary organizations promote the adoption of innovative practices?**
  - » How do these organization „push through“ their interests to influence the development of legal norms, frameworks etc.?
  
- ➔ **What/Who are the key actors in proposing and designing new policies in housing and social care for elderly?**
  - » NGOs, voluntary organizations, private sector? How much are the organizations of the elderly people (as such) included in this process?



# Management of 5 best innovative practices

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## ➔ Evaluation of innovative practices in terms of:

- » Overview and scheme/diagram of all involved actors including their:
  - Mutual responsibilities
  - Legal commitments and obligations (particular legal contracts included)
  - Budget and costs (including budget sharing among the project partners)
- » Who is responsible for coordination and carrying out the practice?
- » Who is involved in the programme (municipalities, NGOs, health authorities, private sector); how duties and rights are divided; what makes the management sustainable in longer term?
- » What are the partnership schemes?
- » Existence of quality assurance and accreditation systems for the innovative practices?
- » Existence of registers, licensing?
- » Forms of participation of elderly on design of the scheme?
- » Risk and benefit sharing among the interested partners, including whether the given stakeholders have a set of controlling tools for each other
- » Types of incentives that are associated with the measure, in order for the parties to get and stay involved in the programme.

## ➔ Literature review:

- » McNelis, S., Neske, C. 2008. Older persons in public housing: the policy and management issues. Australian Housing and Urban Research Institute.



# Time schedule

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## ➔ **November 2011 - December 2011**

- » Draft of project methodology and discussion of methodology

## ➔ **December 2011 - January 2012**

- » Secondary data analysis
- » Literature review

## ➔ **February 2012 - March 2012**

- » Development of standardized questionnaire
- » Transnational consultations of the questionnaire research design

## ➔ **April 2012 - August 2012**

- » Data collection
- » Final discussion of questionnaire methodology

## ➔ **September 2012 – December 2012**

- » Transnational comparison of practices and their evaluation
- » Compilation of main findings – report
- » Formulation of recommendations

## ➔ **January 2013 – June 2013**

- » Report, scientific articles, book (?)



## Recent tasks

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### Until 23 December 2011

- For each country, identification of main coordinating partner, main responsible person of a partner (head of the team of the partner, transnational working team member) and main contact person of a partner (responsible for the research, thematic working group member – if not the same as transnational working team member)
- Sending comments, suggestions, recommendations concerning the content, time schedule and methodology of the research outlined in this presentation

### Until Transnational Event (March 2011)

- Start-up literature review of selected most relevant documents (scientific articles, books, policy studies and reports) published on the topic „housing and care solutions for elderly“ in respective countries and writing: **1) report from literature review** (20 pages); and **2) brief housing policy and housing system overview** (10 pages) – deadline: end of February and send it to us
- **Data accessibility overview** according to our recommendations based on our check of available international secondary data (SHARE, SILC);
- **Selection of practices in each of 5 fields** – each partner will present during Transnational Event the housing policy/system overview and selected 5 practices in each of 5 fields (not evaluation, just description)





## Main coordinating partners for WP3

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- ➔ Friuli Venezia Giulia Region (IT)
- ➔ IS AS CR (CZ)
- ➔ IS SAS (SK)
- ➔ German Association for Housing, Urban and Spatial Development (DE)
- ➔ Municipality of City of Debrecen (HU)
- ➔ Poznan Supercomputing and Networking Center (PL)
- ➔ Slovenian Federation of Pensioners Organizations (SL)
- ➔ Samaritan Burgenland (AT)



**Thank you for your attention!**



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