

University of Southampton Research Repository ePrints Soton

Copyright © and Moral Rights for this thesis are retained by the author and/or other copyright owners. A copy can be downloaded for personal non-commercial research or study, without prior permission or charge. This thesis cannot be reproduced or quoted extensively from without first obtaining permission in writing from the copyright holder/s. The content must not be changed in any way or sold commercially in any format or medium without the formal permission of the copyright holders.

When referring to this work, full bibliographic details including the author, title, awarding institution and date of the thesis must be given e.g.

AUTHOR (year of submission) "Full thesis title", University of Southampton, name of the University School or Department, PhD Thesis, pagination

UNIVERSITY OF SOUTHAMPTON
FACULTY OF SOCIAL AND HUMAN SCIENCES

Centre for Research on Ageing

**The (in)visibility of older people in the
international development discourse**

by

Valerie Lipman

Thesis for the degree of Doctor of Philosophy

March 2011

ACADEMIC THESIS:
DECLARATION OF AUTHORSHIP

I, VALERIE LIPMAN, declare that the thesis and the work presented in it are my own and have been generated by me as a result of my own original research.

The (in)visibility of older people in the international development discourse
.....

I confirm that:

- This work was done wholly or mainly while in candidature for a research degree at this University;
- Where any part of this thesis has previously been submitted for a degree or any other qualification at this University or any other institution, this has been clearly stated;
- Where I have consulted the published work of others, this is always clearly attributed;
- Where I have quoted from the work of others, the source is always given. With the exception of such quotations, this thesis is entirely my own work;
- I have acknowledged all main sources of help;
- Where the thesis is based on work done by myself jointly with others, I have made clear exactly what was done by others and what I have contributed myself;
- None of this work has been published before submission

Date: 25 March 2011

UNIVERSITY OF SOUTHAMPTON

ABSTRACT

FACULTY OF SOCIAL AND HUMAN SCIENCES
CENTRE FOR RESEARCH ON AGEING

Doctor of Philosophy

THE (IN)VISIBILITY OF OLDER PEOPLE IN THE INTERNATIONAL
DEVELOPMENT DISCOURSE

Older people are the world's fastest growing population group. By 2050 eighty per cent of older persons will live in what are now developing countries. There is established and growing evidence of the difficulties families in developing countries are experiencing in providing adequate support for their older members. This thesis explores how international development is responding to the interests of older people. The research examines how older people are represented in international development discourse and illustrates the impact of this on practice. This is informed by a comparative analysis with the progress of women in development.

A critical discourse analysis of a corpus of texts from intergovernmental agencies illustrates the degree of visibility of older people in the development discourse. A case study of the work of inter-government organisations in West Bengal, India, shows how this can impact on grassroots activity. An original conceptual framework is introduced which aligns the dominant development paradigms with the dominant perspectives on older people emerging from this research.

To the best of my knowledge this is the first research study to consider the (in)visibility of older people in international development discourse and to look at its implications on policy and practice. It highlights that a concentration of development resources at one end of the age spectrum to increase life expectancy is being met with an absence of planned support to meet the consequences when people successfully reach old age. The research further shows that when visible, older people are generally viewed as a homogeneous group in need of support and care, and not as citizens able to contribute and participate in development.

The research illustrates a connection between global discourse and local practice in relation to older people and indicates a need for further studies to assess the extent of the links and to examine how local practice could inform the international development discourse.

Acknowledgements

This thesis would not have been possible without the support and advice of many people.

At the University of Southampton I have been warmed by the encouragement and fun of my PhD desk partners: Michelle Heward, Sharon Holden and Nyasha Chiunya-Huni. My thanks go to my supervisors Professor Maria Evandrou and Professor Jane Falkingham, and to Dr Elisabeth Schröder-Butterfill for her invaluable comments on the last stages of preparing this thesis. I should like also to thank the University of Southampton and the ESRC for their financial support in enabling me to carry out the research.

The case study in India would not have been possible without the generous support and gift of time from many different organisations and individuals in West Bengal and Delhi. I extend effusive thanks to them all. My longstanding and dear friend Maitrayee Mukhopadhyay made my stay in Kolkata possible and perfect, and her mother, Mrs Ganguly (masima) and household, provided me with the most wonderful home in Kolkata from which to do my fieldwork. Thanks also to my old and new friends in India who answered many queries and smoothed the practicalities of day to day to living there.

Thanks go to my family and friends for their encouragement and support, to Jenny Holland for providing a starting block to this venture, to Rowena Rowling and Martin Turner for proofreading, and to Annie Turner my desk partner at the British Library. And finally I would not have got by without the warmth, and guidance and comments on the text from Clare Croft-White, Shah Ebrahim, Jon Griffith, Kumi Naidoo, Bethan Pugh, Nicola Stanhope and Penny Waterhouse.

Dedication:

For Miss Daly, who ignited my interest in the rights of older people when I was 12 years old, and without whom I really would not have done this PhD.

Table of Contents

DECLARATION OF AUTHORSHIP	2
ABSTRACT	3
Acknowledgements	4
Table of Contents	5
List of Tables	8
List of Figures	9
List of Boxes	9
Maps	9
Acronyms	10
Terminology	11
Introduction	13
The research questions and research approach	17
Structure of thesis	21
PART I Older people and international development: review of the literature	25
Chapter 1 Gerontology and Development Theory ____	27
1.1 Gerontology: brief survey of theoretical developments	27
1.2 International development: a brief survey of theoretical perspectives	31
1.3 Linking global discourse and local practice	35
1.4 Concluding comments - bringing the theoretical perspectives together	38
Chapter 2 Connecting Ageing and Development ____	43
2.1 Ageing, elder, old age and older	43
2.2 Research on older people in LDCs	47
2.3 Convergence of Gerontology and Development	51
Summary of Part 1 _____	55
PART II Making the invisible visible: conceptual approaches... 59	
Chapter 3 Critical Discourse Theory _____	63
Chapter 4 Moving from the margins: women and development _____	71
4.1 Introduction	71
4.2 The story of women and development	71
4.3 Evidence of the changing discourse on women and development	76
4.4 Older women in the gender and development discourse	83
4.5 Comparing the discourse on gender and development with older people and development	86

4.6 Concluding comments	89
Summary of Part II	90
PART III Research: Discourse Analysis	93
Chapter 5 The engagement of international development agencies with older people	99
5.1 Older People on the UN Agenda: background	99
5.1.1 <i>The arrival of ageing on the UN agenda</i>	103
5.1.2 <i>UN resource allocation to older people</i>	105
5.2 The relationship of the World Bank to older people	112
5.3 Accountability indicators	114
5.4 INGOs and bi-laterals	117
5.5 Concluding comments	120
Chapter 6 Method - Discourse Analysis	123
6.1 Research strategy	124
6.1.1 <i>Rationale and validation</i>	125
6.1.2 <i>Analytical tools</i>	127
6.2 Strategy for selection of texts	131
6.2.1 <i>UN focus on older people</i>	131
6.2.2 <i>Documentation from non-age specific UN activity</i>	132
6.3 Strengths and challenges of the research methods used	138
6.3.1 <i>Strengths of discourse analysis</i>	139
6.3.2 <i>Challenges of discourse analysis</i>	140
6.4 Concluding comments	141
Chapter 7 Findings - Discourse Analysis	143
7.1 General Assembly Resolutions on Ageing	145
7.1.1 <i>Describing older people</i>	146
7.1.2 <i>Engaging the inter-government organisations</i>	147
7.1.3 <i>The role of older people in development</i>	147
7.2 Realising Aspirations - World Summits on Ageing	149
7.2.1 <i>Form and texture</i>	149
7.2.2 <i>Describing older people</i>	153
7.2.3 <i>Engaging the inter-government organisations</i>	155
7.2.4 <i>The role of older people in development</i>	157
7.2.5 <i>Concluding comments</i>	163
7.3 Review of landmark events	164
7.3.1 <i>Form and texture</i>	167
7.3.2 <i>Describing older people</i>	171
7.3.3 <i>Engaging the international bodies</i>	173
7.3.4 <i>The role of older people in development</i>	173
7.3.5 <i>Concluding comments</i>	175
7.4 Review of key agencies	176
7.4.1 <i>Form and texture</i>	176
7.4.2 <i>Describing older people</i>	178
7.4.3 <i>Engaging the inter-government bodies</i>	182
7.4.4 <i>The role of older people in development</i>	183
7.5 Concluding comments	190

PART IV Research: Case Study	195
Chapter 8 Methodology - Case Study in India _____	197
8.1 Rationale and validity for the case study	197
8.2 Identification of case study and research design.....	199
8.3 Research tools	203
8.3.1 Questionnaire survey	205
8.3.2 Consultation workshop	206
8.3.3 Interviews.....	208
8.3.4 Secondary data collection	212
8.3.5 Other events and activities.....	213
8.4 Analysis process.....	214
8.5 Strengths and challenges of the field research	215
8.6 Ethical considerations.....	218
8.7 Concluding comments	220
Chapter 9 India case study: context and background _____	221
9.1 Introduction	221
9.2 Older people in India.....	221
9.2.1 Political, social and economic context	221
9.2.2 Structures and support for older people in India	228
9.3 Older people in West Bengal.....	232
9.3.1 Political, economic and social context	232
9.3.2 Support for older people in West Bengal	235
9.4 Design and structure of WBCSSP	237
9.4.1 The WBCSSP grantholders.....	241
9.5 Concluding Comments.....	243
Chapter 10 Findings: policy makers and funders ____	245
10.1 Overview	245
10.2 Intergovernmental organisations	247
10.3 Funding agency - DFID	250
10.4 NGOs in India	252
10.5 Concluding comments.....	256
Chapter 11 Findings: the programme in practice ____	259
11.1 Overview	259
11.2 Engagement of older people in WBCSSP	261
11.3 Perceptions of role and status of older people in society	264
11.4 Perceived sources of support available for older people.....	266
11.5 Concluding comments.....	268
Summary of Part IV _____	270
PART V Drawing the research together	273
Chapter 12 Discussion and analysis _____	273
12.1 Introduction and overview	273
12.2 Key findings by research questions	276
12.3 Building a conceptual framework.....	301
Conclusion to the thesis: improving visibility.....	308

Bibliography	313
---------------------	------------

Glossary of Indian terms	332
---------------------------------	------------

Appendices	333
-------------------	------------

Appendix 1: Millennium Development Goals Indicators	333
Appendix 2: Annual Reports of INGOs	337
Appendix 3: UN documents reviewed for corpus analysis	340
Appendix 4: Word Frequency Tables:	343
<i>Table 1 World Development Reports – word frequency</i>	343
<i>Table 2 Human Development Reports – word frequency</i>	344
<i>Table 3 Right to Development Working Group - word frequency</i>	345
Appendix 5: WBCSSP Survey	346
Appendix 6: Project information sheet	350
Appendix 7: Interview and meetings schedule February - April 2009	352
Appendix 8: India - Interview Topic Guides	353
<i>I Government and professional bodies</i>	353
<i>II DFID (Kolkata), NGOs and CBOs</i>	356
Appendix 9: Consent Form	358
Appendix 10: Documents reviewed for India case study	360
Appendix 11: Summary of findings from questionnaire respondents	362
Appendix 12: Report of WBCSSP workshop	365
<i>A Briefing & Resources: Global Ageing</i>	379
<i>B Overview of Government Structure, Policies and Entitlements relating to older people in West Bengal</i>	383

List of Tables

Table 1 Research questions and methodological approaches	18
Table 2 Development paradigms and applications	39
Table 3 Gerontology paradigms and applications	39
Table 4 Documents identified for CDA on Women and Development	77
Table 5 Who gets what in the UN	106
Table 6 Research Questions for Discourse Analysis	123
Table 7 Summary of documents for analysis	126
Table 8 Content analysis: terms sought for older people, women and children	128
Table 9 Themes for content analysis	129
Table 10 Landmark events in the development calendar 1982-2007	133
Table 11 UN agencies considered for analysis	134
Table 12 Years identified for analysis reflecting significant events relating to older people	136
Table 13 Summary of documents examined	144
Table 14 Frequency counts on landmark events	165
Table 15 Perceptions of older people in development in landmark events	166
Table 16 Perceived role of older people in development by selected agency	174
Table 17 Word frequency for older people in sample of UN agencies	179
Table 18 World Development Reports: word frequency for older people, women and children	181
Table 19 Human Development Reports: word frequency for older people, women and children	184
Table 20 Right to Development Working Group: word frequency for older people, women and children	185
Table 21 Research questions: impact of discourse on practice	195

Table 22 Response rate of WBCSSP grantholders to questionnaire and workshop	205
Table 23 Total population of India and share of different age groups in the population 1980 - 2030	222
Table 24 Key demographic indicators India 1980 - 2025	224
Table 25 Selected indicators for economic status of older people in India	225
Table 26 West Bengal key demographic indicators 2001	233
Table 27 Selected indicators of government support for older people in West Bengal	236
Table 28 Constituency for inclusion in WBCSSP	238
Table 29 Thematic intervention by district	242
Table 30 Documents reviewed for WBCSSP	246
Table 31 Research questions.....	275

List of Figures

Figure 1 Research Framework	19
Figure 2 Contingent global discourses in gerontology and development.....	51
Figure 3 Timeline: ageing and development.....	95
Figure 4 Case study: research framework –showing activities undertaken.....	202
Figure 5 Summary of methods and instruments deployed in case study	204
Figure 6 Conceptual framework for addressing ageing and development.....	304
Figure 7 Conceptual framework for addressing ageing and development.....	305

List of Boxes

Box 1 The Millennium Development Goals.....	109
Box 2 Whose blind spot? An example of Poverty Impact Assessment in practice	116
Box 3 Standards for evaluation in the UN system - competencies and ethics	116
Box 4 Action Aid International mission statement.....	118
Box 5 Analysis of 2004 WDR: Making services work for poor people	189
Box 6 Parameters for case study.....	200
Box 7 Summary of grantholder engagement (self-defined) with older people	261
Box 8 Examples of intended, direct work with older people	262
Box 9 Unplanned benefits for older people – examples reported by workshop participants	263
Box 10 New ways of engaging with older people: responses from grantholders	264
Box 11 Intergenerational activities - existing examples reported by grantholders	266

Maps

Map 1 Political map showing all the states and union territories of India	223
Map 2 Districts of West Bengal.....	240

Acronyms

AAI	Action Aid India
AIDS/HIV	Acquired Immune Deficiency Syndrome/Human Immunodeficiency Virus
CA	Content analysis
CBO	Community based organisation
CDA	Critical discourse analysis
CEDAW	Convention on the Elimination and Discrimination Against Women
CIDA	Canadian International Development Agency
CMIG	Calcutta Metropolitan Institute of Gerontology
CSO	Civil society organisation
DANIDA	Danish International Development Agency
DESA	Department of Economic and Social Affairs
DFID	Department for International Development (UK)
ECLAC	Economic Commission for Latin America and the Caribbean (UN)
ESCAP	Economic and Social Commission for Asia and the Pacific (UN)
GA	General Assembly (UN)
GDP	Gross Domestic Product
GNP	Gross National Product
GOI	Government of India
GoWB	Government of West Bengal
HAI	HelpAge International
HAI-I	HelpAge International - India
HDI	Human Development Index
HDR	Human Development Report
HPI	Human Poverty Index
ICESCR	International Covenant on Economic, Social and Cultural Rights
IEG	Independent Evaluation Group (World Bank)
IGO	Intergovernmental organisation
ILO	International Labour Organisation
IMF	International Monetary Fund
INGO	International non-government organisation
LDC	Less developed country
MDGs	Millennium Development Goals
MIPAA	Madrid International Plan of Action on Ageing
NGO	Non-governmental organisation
NREGA	National Rural Employment Guarantee Act (India)
NRHM	National Rural Health Mission
OECD	Organisation for Economic Co-operation and Development
OECD DAC	OECD Development Assistance Committee
OHCHR	Office of the High Commissioner for Human Rights (UN)
PRIA	Society for Participatory Research in Asia
PRSP	Poverty Reduction Strategy Paper
RtD	Right to Development
SAP	Structural Adjustment Programme

SHDR	State Human Development Report
SHG	Self help group
SIDA	Swedish International Development Cooperation Agency
UNCHR	United Nations Commission on Human Rights
UNCRC	United Nations Convention on Rights of the Child
UNDAF	United Nations Development Assistance Framework
UN-DESA	United Nations Department of Economic and Social Affairs
UNDP	United Nations Development Programme
UNECE	United Nations Economic Commission for Europe
UN-ECOSOC	United Nations Economic and Social Council
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNFPA	United Nations Population Fund
UNICEF	The United Nations Children’s Fund
UNRISD	United Nations Research Institute for Social Development
USAID	United States Agency for International Development
VIPAA	Vienna International Plan of Action on Ageing
WB	World Bank
WBCSSP	West Bengal Civil Society Support Programme
WDR	World Development Report
WHO	World Health Organisation

Terminology

‘Less developed countries’, ‘South’ and ‘developing countries’ are used interchangeably throughout the thesis. The geographical regions covered by these terms are Africa, Central America, South America, Asia excluding Japan, and Oceania, excluding Australia and New Zealand (UN Statistics Division, December 2010).

‘Old people’: in the absence of a consensus about how ‘old people’ are referred to ‘older persons’ and “older people” will be used. The former is the term used by the UN and the latter is the term more commonly used in the field of gerontology. The section on India occasionally includes other terms used by organisations working with older people in India. These include ‘the aged’, ‘senior citizens’, and ‘elderlies’.

‘Older’: There is no universally applicable definition of what constitutes old age (Heslop and Gorman, 2002:171). The internationally recognised United Nations guideline of 60 plus is thus used in this thesis.

Introduction

Demographic projections and anticipated social change indicate that the position of the elderly and the aged in society is expected to deteriorate in many industrialised as well as in many developing countries unless appropriate policies are initiated to deal with their needs and to ensure opportunities for their participation in national life and their contribution to the development of their communities (UN, 1971).¹

The world's population is steadily ageing and older people are now the world's fastest growing population group. As a consequence of the long term reductions in both fertility and mortality, half of the increase in the world population over the next 40 years will be accounted for by a rise in the population of those aged 60 years or over, whereas the number of children (persons under age 15) will decline slightly (UN-DESA, 2007a:9). Of an estimated 673 million people aged 60 and over in 2005, 430 million (64 per cent) live in less developed countries (UN-DESA, 2007a). Due to the combined forces of population growth and the speed of age-structural change in these societies, one in five persons across the world will be over 60 by 2050 and for the first time in human history people in this age group will outnumber children. By 2050 eighty per cent of older persons will live in what are now developing countries (Vos et al., 2008). The forecast rise in the number of older people 'will lead to an expansion of demand for health, housing accommodation and pensions for aging populations and is thus of crucial importance for governments, policy makers, planners, and researchers in all nation states' (Powell, 2010:2).

HelpAge International (HAI) has argued that the right of older people to development is routinely denied, with ageing seen as a minority interest or case for special pleading (HelpAge International, 2000). In developing countries older people often have 'the lowest levels of income, education and literacy, they lack savings and assets, have only limited access to paid work, and even in times of crisis are usually the last to be cared for by emergency aid programmes' (Harper, 2004:1). Additionally there is established evidence showing that the conventional forms of kinship and informal support for older

¹ General Assembly 2025th plenary meeting 18 December 1971 *Question of the elderly and the aged*

people are becoming insufficient. The reasons for this insufficiency are substantially associated with changing family structures arising from urbanisation, industrialisation, the growing participation of women in the workforce, the effects of HIV/AIDS and the changing expectations of young people (Cowgill, 1972, HelpAge International, 1999, Pal, 2004, Aboderin, 2005, Holzmann and Hinz, 2005).

Significant demographic characteristics are present within the older population. Those aged 80 years and over are the fastest growing age group, at a factor of 6.7% per year (Vos et al., 2008); and women outnumber men, especially in later years as women make up over 60 per cent of people aged 80 years and over (Vera-Sanso and Sweetman, 2009). The older population, covering an age span from 60 to 100 years is also a widely heterogeneous category of people (Arber and Evandrou, 1993). Experiences of later life differ substantially depending on economic and social circumstances and opportunities in earlier life, on access to support and security in later years, on relationships, wellbeing and psychological approaches to life (Lloyd-Sherlock, 2010). An appreciation of these differences combined with the demographic characteristics are essential for creating, designing and delivering responses to meet the range of needs and interests of the growing numbers of older people.

This thesis examines the ways in which older people have been traditionally represented in international development discourse and how these representations have, in turn, shaped the manner in which development policies and practice have reflected the needs and interests of older people. The distinction in the use of the terms 'needs' and 'interests' is used throughout this thesis to ensure that both objective factors, such as food, shelter and care, and subjective factors which recognise personal aspirations and agency, are taken on board (Molyneux, 1998). The opening quote to this chapter by the UN in 1971 reinforces the supposition that population ageing is not a new phenomenon and acknowledges the range of dimensions of population ageing. There has been time for policy-makers to plan for the changing demographic structures of the populations worldwide. Further, the thesis suggests that most international development programmes continue to focus on maternal and child health, education and training for children and

young people, infrastructure developments, and - increasingly - the environment. While some of these developments will benefit older people, direct reference to them is rarely expressed in such programmes. In a review of the activities of 18 bi-lateral agencies in 1999, HAI found that most of the agencies were unaware of issues affecting older people but that programmes relating to health or to people with disabilities may take older people into account (HelpAge International, 1999)².

The research focus is on people whom a given society defines as old, as distinct from individuals and populations who are 'ageing'. While the extensive literature on the lifecourse approach to old age is acknowledged (Arber and Evandrou, 1993, Bengtson et al., 2005a, Hareven, 1995), the purpose of *this* research is to examine how the interests and needs of older people in their old age are being addressed. In the absence of a universally applicable definition of what constitutes old age (Heslop and Gorman, 2002), the age of 60 years, used by the United Nations for demographic analysis, is typically taken as the dividing line between younger and older cohorts of the population in developing countries (Vos et al., 2008).

Background to the study

This research builds on an earlier study that I carried out for an MA thesis³. In a study of the curricula of post-graduate Development Studies programmes in UK universities for the academic year 2004/5 my research revealed an absence of teaching about older people's specific needs and potentials and a general lack of interest and awareness in international development (Lipman 2005). As forms of pedagogy experienced by cohorts at any particular time influence current and future social relations (see Kress, 1996), it is possible the inclusion of older people's interests in post-graduate teaching would have an

² Each of the four UN bodies reviewed in HAI's (1999) report was engaged in some activity relating directly to older people. The UN Development Programme (UNDP) was reported as trying to improve the capacity of older people to contribute to their communities; the World Health Organisation (WHO) had established a global Programme of Health for the Elderly; the UN Population Fund (UNFPA) discussed assessing the health care of older people; and the World Bank was actively promoting pension reform in many countries.

³ Dissertation for MA in Humanitarian and Development Practice from Oxford Brookes University completed 2005.

impact on the approach of professionals working in the field of development. My examination of the content of UK post-graduate development studies courses indicated that the teaching interests were framed by the quality of research methodologies and the history of development; and by a range of external agents, including the policy community, funders and students. The research further showed that UK-based international aid agencies did not consciously integrate the interests of older people into their programmes although older people could benefit as part of a broader strategy. As an informant from one international non-government organisation (INGO) stated: 'We do not have a policy on the elderly, but if older people are part of a community scheme they get brought in' (Lipman, 2005:34).

Over the past 50 years, during which development has become an academic discipline, theory and practice have moved from the post-colonial period of helping 'them' to become more like 'us' through to 'empowering' governments, communities and individuals in the developing world (Remenyi, 2004). Policymakers in the field of development now tend to focus on themes for change, such as poverty, HIV/AIDS and governance in Less Developed Countries (LDCs) rather than providing the former project-based support; and on improving impact measures of development programming, in order to refine the interventions of development (Remenyi, 2004).

Older persons and other marginalised groups in a community are potentially affected by almost every programme in which development workers are involved. Initiatives tackling poverty are as relevant for older people as they are for the young (Randel et al., 1999). Income generation schemes and credit provision could be extended to older people. Similarly, literacy work, training and education are valuable for older people, not only for the financial benefits that would accrue from the attainment of such skills, but also as a factor in supporting their citizenship rights, in helping create inclusive societies and in smoothing the transition between traditional and modern societies.

For the reasons stated above pertaining to the neglect of older people, consideration needs to be given to how older people fit within the development discourse. The current

research seeks to examine the shifting representations of older people in the policy agendas of international bodies at different levels of agency (international, national and local). An important parallel in the history of international development discourse and practice relating to shifting representations of a social group is in the area of gender and development. The parallels between the two areas (older people and women) have hitherto not been drawn and will be explored in this thesis. After decades of neglect, women's needs and contributions and their relationship to power and status in public and private spheres have acquired a normative position in the field of development discourse and practice. This is not to deny that there is still much to be done to in enabling women to gain equal recognition and status with men (Kabeer, 1994, Cornwall et al., 2007). Experiences of progress in the field of gender and development will thus be looked at to help understand how older people are placed in international development, and the extent to which the level of recognition they receive within the discourse is intentional or inadvertent.

The research questions and research approach

There are six overarching questions under consideration. These are summarised below in Table 1. The first five examine the past, present and possible future representation of older people in development. They are concerned with how older people are represented in key policy discourses on development and how their representation has changed over time from the first international summit on ageing held in 1982 till 2007; how the representation in the discourse has affected the position of and opportunities for older people in development practice; what factors may be inhibiting the inclusion of older people; and whether there are discernible points of leverage that would enable the needs and contributions of older people to be integrated holistically into wider development practice. The final question is a more epistemological one which addresses the extent to which links between the global and local can be demonstrated. Table 1 further presents the methodological approaches taken to examine those questions, with some indicators of the areas of analysis that will be sought when examining the discourse (Fairclough, 1993b).

Table 1 Research questions and methodological approaches

Research Question	Evidence exemplars	Methodology	Chapter
1. How are older people represented in key policy discourses on development?	What the key development theorists, IGOs and INGOs are saying about older people in their reports and conferences	Literature review; content analysis of grey literature, including sample of IGO and INGO annual reports	Chapters 1 & 5
2. How has the representation of older people changed over the last 25 years?	Evidence of changed language use and incidence of reference to older people by IGOs and INGOs	Discourse analysis of selected UN documentation and annual reports	Chapters 5 & 7
3. Has the representation in the discourse affected development practice for older people, and if so how?	Evidence of policy changes and changed practice on the ground	Case study: primary data collection through interviews with organisations IGOs and INGOs in India	Chapters 10 & 11
4. Are there factors holding back IGO and INGO engagement with the interests of older people, and if so, what are they?	Different understandings of the lives of older people; organisational constraints; parallels with lessons from gender and development	Literature review Discourse analysis Case Study Interviews	Chapters 1, 5, 7, 10, 11 & 12
5. What factors would influence a positive change in policy and practice for the benefit of older people?	Review how change happens in parallel discourses e.g. gender; examples of grassroots activity	Literature review Interviews	Chapters 1, 5, 7, 10, 11 & 12
6. To what extent is it possible to establish a connection between global discourse about older people and local development practice?	Knowledge of international initiatives on older people, examination of parallel case of gender discourse and local development; iterative learning mechanisms	Literature review Discourse analysis Case study Interviews	Chapters 1,5,8 & 12

A holistic approach was taken to explore the normative position of older people in international development. This involved examining the literature in development to identify whether and how older people have been represented; reviewing the main agencies involved in international development to identify how the discourse has influenced their policies and practices, and finally, through an illustrative case study,

engaging directly with practitioners at national and grassroots levels to identify whether and how local practice has been informed or influenced by the dominant global development discourse.

Figure 1 Research Framework

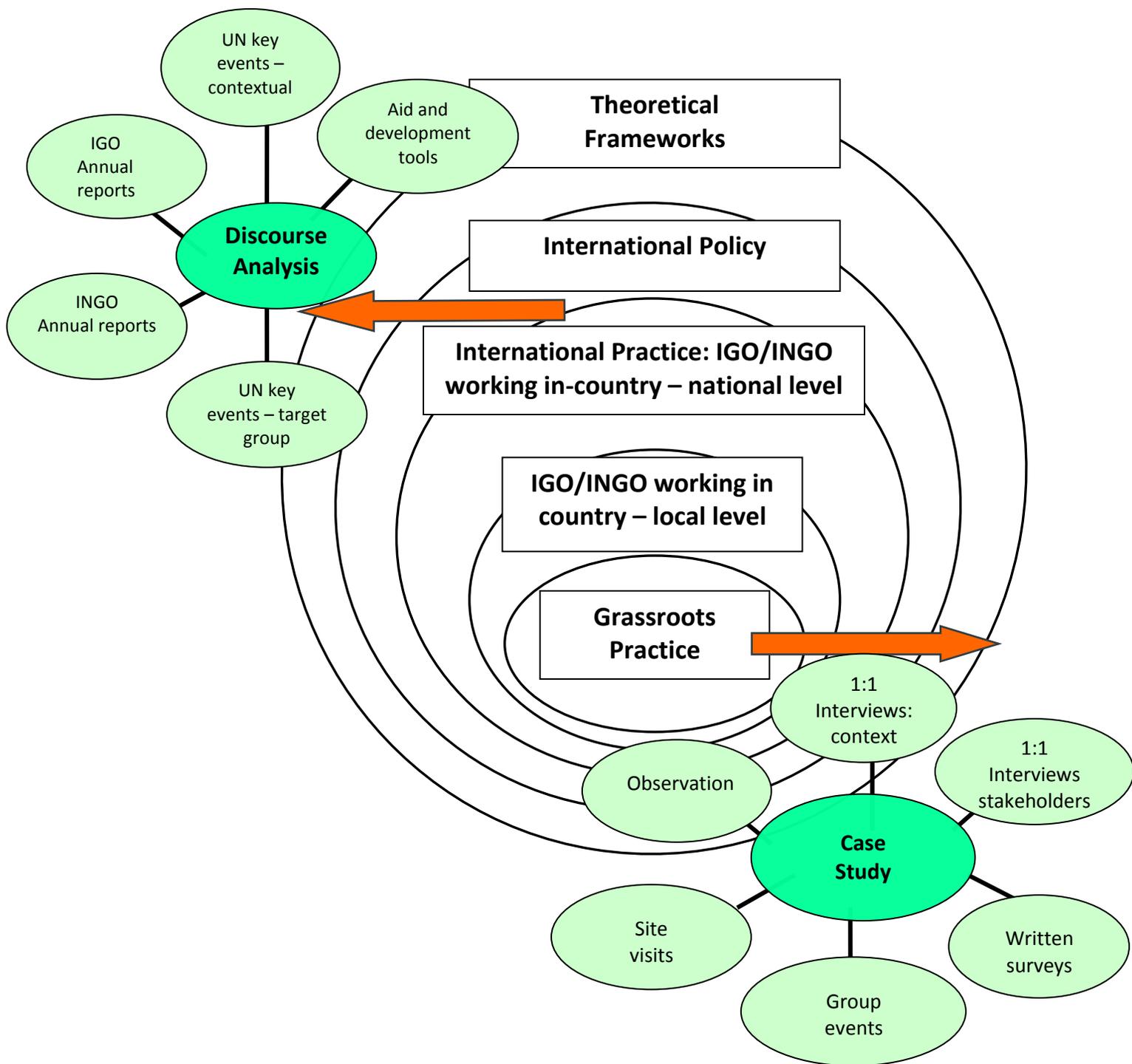


Figure 1 illustrates the multi-level perspective approach of the research, incorporating engagement at the theoretical, policy and practice levels. The concentric circles at the centre of the diagram indicate the different tiers of agency that were explored. The study began with a review of the major disciplines of gerontology and development (as indicated by the outer circle), to gain an overall picture of how they each addressed 'ageing and development'. It moved inwards to review the discourse at different tiers of activity from the key paradigms in development to policy formulation and implementation to grassroots practice.

The primary research took place in two stages. In stage one a content analysis was undertaken of a range of UN documentation from key UN agencies and landmark events in order to explore in depth whether and how older people were represented during the 25-year period under review. This stage is represented on the left-hand side of Figure 1. The findings of the content analysis are presented in Chapter 7. The second stage of research sought to bridge the gap between global discourse and local practice by examining the 'in-country' operation of international bodies, using a case study approach. This is represented on the right-hand side of Figure 1. The case study focused on a DFID funded programme in India designed to alleviate poverty through improving democratisation and participation at a local level. A range of methods was used, including interviews with international, national and local development agencies, to ascertain their perspectives on ageing and development and to assess the role of both the agency and the individual in influencing and shaping the process of policy and institutional change (Grindle and Thomas, 1991). The specific aims of the case study were thus to examine (i) the implicit and explicit representation of older people within the design of an internationally supported project, (ii) the extent to which older people's specific needs were taken into account, (iii) the degree to which intended and unintended consequences of the project positively or adversely affected the wellbeing of older people, and iv) how international discourses shaped the local case study activities. The fieldwork involved a ten-week visit to Kolkata and Delhi in India in 2009.

Critical discourse theory (CDT) provides the heart of the analysis in this thesis, offering an approach committed to the cause of social justice, unravelling the sources of power and identifying possible solutions for change. A Foucauldian approach is taken which provides the means for exploring a particular discourse over time and reflecting on its legitimacy within its own specific historical context (Foucault, 1989). Traditionally, CDT has been concerned with the interpretation of what is present linguistically in a discourse. This study is concerned also with a textual silence in a discourse. In this circumstance the suggested means of analysis is to examine what Huckin (2002) has described as the ‘surrounding context’, that is, the social situation and all factors at hand of relevance or possible relevance to the participant (the older person in this case) to determine what *could* have been said (Huckin, 2002). Fairclough (1995) has created a framework for discourse analysis which combines the means for identifying the silences in a discourse, for analysing the representation of a subject and for applying a Foucauldian approach to socio-political discourse. It is this framework that will be used as the basis for CDA in this thesis.

Structure of thesis

The thesis is divided into five parts. Part I consists of two chapters which together provide a brief summary of the key theories in gerontology and development over the last 50 years and their relationships with local practice; and a review of the literature in ageing and development. The purpose is to provide the context for the thesis. The literature review on ageing and development draws out two distinctive features which are central to this thesis. Firstly, it examines the terms ‘ageing’, ‘old age’, and ‘older’ in order to distinguish between ‘ageing’ as a life process affecting everyone at all ages, from ‘older people’ who are the subject of this thesis. Secondly, a distinction is drawn between research on older people in LDCs and research on older people as a constituency in the development paradigm. The distinction is central to this thesis, because the thesis is seeking to examine the role of older people in development rather than the lives of older people in LDCs. The chapter goes on to examine the basis and legitimacy of current assumptions about the lives of older people and concludes with a section on the

points of convergence between the gerontology and development disciplines. Part II, comprising Chapters 3 and 4, discusses the conceptual frameworks that underpin the analysis. This includes a discussion of the relevance of discourse theory to this thesis, in Chapter 3; and Chapter 4 draws on material from the gender and development debate as an exemplar of how other marginalised groups have achieved recognition and visibility in society (Tinker, 1997). It offers an overview of the changing status of women in the development discourse and through a content analysis of selected texts examines the impact this has had on practice. The position of older women is presented as a discrete section. The chapter concludes by presenting some of the conceptual differences and points of purchase between gender and development and ageing and development. Parts III and IV present the two areas of empirical research. Part III describes and discusses the rationale, research strategy and findings of the discourse analysis. It opens with a timeline for 1982-2007 indicating the international landmark events in the 'ageing and development' calendar during the period under review (see Figure 3). These landmarks are shown alongside significant contemporaneous actions in international development, such as the World Summits on Social Development held in 1995 and 2005, and are presented against the background of changing global events to provide the wider 'surrounding context' (Huckin, 2002). The documents reviewed were identified as having been part of global social policy-setting agendas since 1982, the year in which the first World Summit on Ageing took place. This not only necessitated examining agenda-setting documents aimed specifically at older people, but also those with a broader remit in order to investigate the degree to which older people's interests are included in wider policy discourses and frameworks (Visvanathan, 2005). Chapter 5 presents an overview of that documentation. Chapter 6 describes the research strategy for the qualitative content analysis, including the rationale for the selection of texts and the tools used for analysis; and Chapter 7 presents the analysis of the data. Part IV (Chapters 8-11) describes and analyses the case study (see Figure 1). As described earlier, the purpose of the case study is to explore how the discourse in international development can influence the practice of development at the grassroots. Chapter 8 presents the reasons for the selection of the case study site and the tools and instruments deployed for the research. Chapter 9 provides contextual information on India and West Bengal. The findings are

divided into two parts: Chapter 10 analyses the policy and funding framework of the case study; and Chapter 11 examines the local practice to identify the extent to, and ways in which they reflect the activities of the policymakers in noting and addressing the interests of older people. The research findings from all sections of the thesis are brought together in Chapter 12. Here a new conceptual framework aligning the dominant development paradigms with the dominant perspectives on older people is presented.

A number of alternative approaches could have been taken to exploring this subject using different development models, such as human rights, social inclusion, marginalisation or wellbeing (Gough et al., 2007, Saith, 2007b, Megret, in press 2011). These aspects are not ignored but the primary focus here is on the under-researched area of how older people are represented in the prevailing development discourses. An approach was thus taken that would accommodate the key bodies of thought in development theory over the last 25 years, to identify patterns of dominant thought and influences. While the research restricts itself to the period 1982 -2007, it notes key changes in the field of ageing and development that have taken place since 2007. In the context of this thesis the most significant of these is the growing advocacy for a UN Convention on the Rights for Older Persons.

The research shows that the key frameworks and policies in international development have ignored older persons and that this has impacted on the development of programmes on the ground. Development theory, policy and practice are found not to be regarding older people as equal citizens, as contributors to or consumers of an economy. There is evidence however that older people are contributing to their local economies – not least because they are forced to in the absence of an adequate and affordable health and welfare structure - through direct application of their labour; through the informal economy of supporting families so that other members can go out to work; as care providers; as holders of tradition; as mentors and as advisors.

It is not the intention of the thesis to reify older people or to put them forward as requiring special attention. Struggles for the recognition of difference can be

counterproductive to the interests of the group in the longer term by ‘encourag[ing] separatism and group enclaves. (Fraser, 2000:92). The singling out of a particular group for special attention has however been shown to be an important way of ensuring that vulnerable groups receive the attention they need (Fraser and Honneth, 2003). The adoption of separate UN Conventions for different social groups over the last 60 years indicates that it is sometimes necessary to make additional efforts to ensure that everyone receives the protection offered under the UDHR (Megret, in press 2011). Little attention has been paid to the quality of life and expectations of the older person, yet increasing life expectancy is used as a marker of success in development (Skinner and McSharry, 2005). It is timely to investigate the consequences of increasing numbers of older people and of people living a longer old age.

PART I Older people and international development: review of the literature

Part I provides an overview of the academic and policy literature relating to older people and international development. It outlines the main theories in the separate disciplines of gerontology and development over the last 50 years, it examines the conceptual difficulties in defining old age, and reviews the literature on ageing and development.

There is little published literature which takes a broad and holistic perspective on the implications of international development for older people. The key exceptions over the last 25 years (Neysmith and Edwardh, 1984, Treas and Logue, 1986, Sen, 1994, Randel et al., 1999, Lloyd-Sherlock, 2004, Vos et al., 2008, Lloyd-Sherlock, 2010), present the links between development, population ageing and older people, and acknowledge that a wide range of mechanisms, not just single solutions, need to be put in place to meet the changing circumstances in which older people are finding themselves in low income countries. These works tend to be wide in scope, rather than empirical studies of particular situations.

HelpAge International's (HAI) early publication 'Ageing in Developing Countries' (Tout, 1989) provided the first in-depth look at the impact of increasing life expectancy on older people in developing countries. HAI's later publication, 'The Ageing and Development Report: Poverty, Independence & the World's Older People' (Randel et al., 1999), gave an updated overview of the needs and interests of older people in the Less Developed Countries (LDCs). In 2002 a research conference on ageing held in Valencia, Spain,⁴ confirmed a research agenda which has since yielded a growing body of literature at the global level.

In the absence of much directly-related literature, areas that are contiguous with the

⁴ The Research Agenda is a joint project of the UN Programme on Ageing and the International Association of Gerontology and Geriatrics. The complete text is available on <http://www.un.org/esa/socdev/ageing/researchagenda.html>

subject are explored. Theories in the separate domains of gerontology and international development are examined first, to provide both a theoretical underpinning for the research and to identify whether there are commonalities between the two disciplines. Notwithstanding the paucity of literature on development theory and ageing, there is a growing body of specialist literature on ageing in LDCs, relating particularly to poverty, social protection and livelihoods (Palloni, 2001, Barrientos, 2002, Heslop and Gorman, 2002, Lloyd-Sherlock, 2004, Barrientos and Hulme, 2008). Population studies and anthropology present possibilities at different ends of a spectrum: population studies take an interest in the impact of changing demographic trends and patterns on development, though not necessarily older people (Pool, 2006, Dyson, 2010). Among anthropologists, who are traditionally concerned with micro-social affects of large political and economic events (Grillo, 2006, Makoni, 2008), there has been an increasing interest in the lives of older persons as a result of changing family and community structures (Aboderin, 2004, Vera-Sanso, 2004b, Schröder-Butterfill and Kreager, 2005, Sokolovsky, 2009).

Part 1 comprises two chapters. Chapter 1 reviews the main theories in the separate fields of ageing and international development. The purpose is to provide a framework for viewing the changing perceptions of older people and the ways in which their interests have been and are currently being addressed. Section 1.1 presents an overview of the dominant theories in gerontology to identify where they may interact with international development. Sections 1.2 and 1.3 present the dominant theories in international development, and examine the linkages between global discourse and local practice to review how they reflect the interests of older people. Chapter 2 examines potential points of convergence between development and ageing theories and approaches. It opens with a review of the definitions of older, ageing and elderly in the context of this thesis. The chapter continues with an exploration of the literature on ageing and development and distinguishes this from the literature on research about older people in developing countries. It closes with a section that identifies key areas of convergence in approaches to policy and practice in the domains of ageing and development: from solution-based themes for individual nation states, such as social protection, to conceptual frameworks in which to consider issues of ageing and development.

Chapter 1 Gerontology and Development Theory

1.1 Gerontology: brief survey of theoretical developments

An overview of the key developments in gerontological theory over the last 50 to 60 years is presented here to provide an understanding of the main approaches taken towards older people during the period under review. In the context of this thesis on international development it is important to note that gerontological theory has mostly originated in and focused on Europe and North America (Walker, 2005, Holstein and Minkler, 2007). Perceptions of how older people are regarded and attended to in the gerontology literature are thus mostly predicated on western understandings of old age and attitudes to older people (Harper, 2006, Sokolovsky, 2009).

Dominant discourses on ageing have been concerned with health, as ‘the foundation of a good old age’; accompanied by narratives of retirement and pension provision (Johnson, 2005, Holstein and Minkler, 2007). Early studies in ageing took a bio-medical perspective of older people, interested in the physical aspects of ageing and how and why the body aged (Jeune and Christensen, 2005). After the Second World War, studies of ageing grew in response to the changing demographic composition of societies (Bowling, 2005). Theories of individual and societal roles, responsibilities and relationships and psychology-based theories of ageing evolved, exploring how older people adapted with age in order to maximise their potential (Victor, 2005). Disengagement theory of the 1960s, the first to move away from viewing ageing solely in biological terms, presented human ageing as an inevitable process of withdrawal from relationships in anticipation of the person’s death, mutually enforced by society and the individual (Cumming and Henry, 1961). The engagement and successful ageing theories of the 1970s and 1980s, began to capture a process of affording status to older people, holding that old age had the potential of being ‘successful’ or ‘positive’ and could be achieved by maintaining roles and relationships rather than abandoning them (Bowling, 2005).

‘Successful’ ageing was however dominated by factors relating to physical and mental health functioning and risk factors. The maintenance of good health was regarded as

entirely within the power of the individual (Baltes et al., 2005). Holstein and Minkler (2007) maintain that such generalisations ignore the different life experiences, expectations and circumstances of people and create a normative model more concerned with providing standardised responses to ageing than dealing with the heterogeneous experiences of ageing. The focus of social and psychological theories failed however to acknowledge the strength and influence of social structures and power on successful ageing, hence rendering invisible many factors which contribute to the status of older people in society (Minkler and Cole, 1999). In consequence, policy responses tended to focus on remedial actions rather than a review of the power relationships and status of individuals and groups within society at large.

Early political analyses of older people presented them as social dependants: their dependency substantially induced by enforced retirement at the age of 60 or 65, resulting in restricted social roles, reduced income and dependency on state or private benefits (Victor, 2005). This removal from the workforce combined to highlight the exclusion of older people from the 'mainstream' and the view of their being burdensome: to the family, the community and the state (Townsend, 1981, Walker, 1981). Where the social model of older people had considered the issue of 'the old' as a socially created problem (Gubrium, 2005) the political economy of ageing approach sought to explain variations in the treatment of older people, compared to other groups in society and among older people. Older people were no longer to be viewed as an amalgam of their health and care support needs, but regarded as an integral part of the wider socio-political economy whose interests must be balanced with others in society (Walker, 1981, Fennell et al., 1988, Phillipson, 2005).

As new economic crises emerged in the 1970s in the UK and USA, the costs of the welfare state began to be questioned and cuts in public expenditure began to be imposed in the 1980s (Victor, 2005). Examination of public policy and patterns of resource allocation has demonstrated that the wellbeing of older people was rarely a consideration in the post war years (Bytheway, 1995, Thane, 2005). It can be argued though that older people benefited directly in the post-war era from the development of the welfare state,

with the creation of the National Health Service, pensions policy and the establishment of social care in England and Wales (Glennerster, 2007).

The study of the state was central to understanding old age and the life chances of older people since it had the power to (a) allocate and distribute scarce resources to ensure survival and growth of the economy, (b) mediate between the different segments and classes of society, and (c) ameliorate social conditions that could threaten the existing order (Phillipson, 2005:504).

The combination of concerns about limited resources and more awareness of negative ageist attitudes towards older people resulted in some changes in practice in working with older people and the need for different approaches to an ageing population (Bytheway and Johnson, 1990). Older people were to be consulted, involved, and invited to participate in public plans concerning their later years. The World Health Organisation adoption of the term 'active ageing' expressed a vision of the 'continuing participation of older people in 'social, economic, cultural, spiritual and civic affairs not just the ability to be physically active or to work participate in the labour force' (WHO, 2002a:12). 'If ageing is to be a positive experience, longer life must be accompanied by continuing opportunities for health, participation and security (ibid). Indeed, the transition to the active ageing model sought to present older people as being able to confront their later years with vigour and new achievements (Andrews, 1999). The intention was to be positive about old age. However its adoption by the 'Anti-Ageing Industry' has created a form of inverted ageism in which the difficult reality of old age for many is denied (King and Calasanti, 2006). In some respects 'active ageing' has placed a different burden on older people. Andrews (2009) comments on the fundamental premise of successful ageing that the level of success lays within an older person's own control through maintaining physical and cognitive functions, active engagement with life and avoidance of illness. Older people are virtually obliged to be active, engaged and positive about old age. In failing to be so, they become victims of what some are now referring to as a 'new ageism' (Torres, 2006, Andrews, 2009).

The growing research focus in western gerontology on positive ageing has nonetheless generated a wider scope for looking at the wholeness of people's lives, and critically inviting older people to say what is important in their own lives (JRF, 2004, Bowling and

Dieppe, 2005, Coast et al., 2008). Grundy et al (2007) have, for example, shown that strong social interactions and body care have the biggest impacts on an older person's sense of wellbeing. Research by Coast et al (2008), seeking to develop a tool for measuring the impact of social policy on older people, identified attachment, security, enjoyment, role and control as being the key areas of value to older people (Coast et al., 2008). The study by Molzahn et al (2010), examining the relative importance of aspects of quality of life (QOL) to older adults across cultures, showed, as the following quote shows, there were statistically significant differences in ratings between participants in developed and developing countries:

People in developing countries rated overall health and every facet of physical QOL of higher importance than those in developed countries. Similarly, it was more important in developing countries to have support from others, sufficient financial resources to meet their needs, and to be able to get adequate social care (Molzahn et al., 2010:4).⁵

An earlier study by Skevington (2009) in Ethiopia, Bangladesh, Peru and Thailand identified other new themes relating to poverty. Physical fitness and survival, social status, community relations, family life, work opportunity and environment, fairness and equality and perceptions of political institutions were new aspects of QOL that emerged as being of importance. While these are not exclusively about older people they have the potential to contribute to an understanding of what may be of importance to older people living in poverty in LDCs. The contrast between 'community relations' as a feature of QOL in developing countries and Walker's (2005) description of the essence of western gerontology is striking:

The underlying value embraces a commitment to individualism and individual achievement ... in North American society, and to a lesser but still powerful extent in the UK (Walker, 2005:17).

The differences between the aspirations of the West and of the LDCs relating to older people present potential challenges to a global application of dominant western gerontological theory and approaches. Consideration of these challenges is particularly

⁵ The study took place in a variety of settings located in Australia, France, Switzerland, England, Scotland, USA, Israel, Spain, Japan, China (mainland and Hong Kong), Turkey, Lithuania, Czech, Republic, Hungary, Canada, Norway, Sweden, Denmark, Germany, Brazil and Uruguay.

pertinent at the current time as western gerontology starts to examine the impact of globalisation on older people (Phillipson, 2003, Walker and Deacon, 2003).

Globalisation and ageing are discussed in more detail in Chapter 2, taking into account the salient points from international development theory, discussed in the following section.

1.2 International development: a brief survey of theoretical perspectives

Development in the context of relative economic and social positions of different countries comprises many features, though it is commonly accepted in international terms as something that applies to the poor countries of the world. It has variously been defined as a practice (Hamdi, 2004); a process, frequently deploying external interventions with the simultaneous joint aims of transforming society, improving the circumstances of the poor and ‘empowering’ people to manage and direct that improvement (Tomasevski, 1989, Stiglitz, 1998); and an outcome (World Bank, 2007). Stiglitz, a former Chief Economist of the World Bank, has described development as ‘a process that involves every aspect of society, engaging the efforts of everyone: markets, government, NGOs, cooperatives, not-for-profit institutions’ (Stiglitz, 2007:26). As the focus of attention in this thesis is on a particular social group rather than on institutions or the means of production it takes the definition provided by the UN Development Programme’s first Human Development Report as its starting point, which held that: ‘The basic objective of development is to create an enabling environment for people to enjoy long, healthy and creative lives’ (UNDP, 1990:9).

Development policy and practice emerged as a response to the new world order following WWII., which had left the West unable to sustain its colonial power, saw the emergence of the Cold War, and rising US power (Grindle and Thomas, 1991, Corbridge, 1995, Escobar, 1995). Together these precipitated the shifts from European colonial power in Africa, South-East Asia and India to new emergent nations which wanted and needed ‘development’ in order to become self-sustaining (Corbridge, 1995). The prevailing

paradigm at the time was to help the 'underdeveloped' be more like the West (Rodney, 1973, Bytheway, 1995, Dodds, 2002). International Development became an acknowledged school of theory and practice in the 1950s (Corbridge, 1995). An extensive body of literature on development theory has been published since that time, moving from the post-colonial years during which 'successful' development was traditionally viewed as being within the control of individual nations, to the current world systems and globalisation theories in which interdependence and interaction are viewed as taking precedence over the nation state (Wallerstein, 2004).

Development has moved several steps from its early post-colonial days in the 1960s. Many different strategies, guidance and goals concerned with the practical interpretation of such theories for LDCs have been produced, implemented and evaluated (Desai and Potter, 2008). The 1970s saw a broader understanding of other cultures and societies and their struggles for change. This yielded support for more locally defined development objectives and introduced an era in which there was greater expressed interest in the lives of people and communities rather than systems and outputs, as witnessed through participant engagement in development and rights-based approaches (Corbridge, 1995, Kothari and Minogue, 2002). Global economic crises at the end of the 1970s and in the early 1980s led to attempts to define what poverty really meant for those living in LDCs and to changes in thinking about what constituted successful development (Corbridge, 1995). The traditional measure of 'successful development', the Gross Domestic Product (GDP) with its single goal of assessing the total level of wealth of a country, did not provide a measure of poverty within a society. It also failed to take account of income disparity or the quality of life of the individuals in any given within a society, (Hicks and Streeten, 1979, Streeten, 1981, van den Bergh, 2007). Alternative approaches developed through the 1970s sought to measure social and human, as well as economic, development, with the use of social indicators such as education and health. Individuals were deemed to have basic needs, defined as being the absolute minimum resources necessary for long-term physical wellbeing, usually in terms of material goods, such as water, food and housing (Hicks and Streeten, 1979). Although this approach was criticised as post-colonial patronisation, (perceived as creating a culture of welfare

designed to maintain the productive capacity of people), there was increasing recognition that development was about people and not just about the development of the economies in which they lived (Streeten, 1981). This in turn began to yield a more ‘people-centred’ approach to development (Korten, 1990).

At the same time however, as the definition of need became more progressive, solutions became constrained by the global economic crises of the late 1970s and 1980s. These led to stringency in public funding, and a focus on privatisation and self-reliance (Stiglitz, 1998). In order to reduce inflation and the fiscal imbalance of the 1980s in LDCs, the IMF introduced Structural Adjustment Programmes (SAPs). Loans by the IMF were made conditional on LDCs meeting certain goals formulated by the IMF. Their stated aim was to move countries away from self-determined programmes of national development, which focused on the domestic market and internal social development programmes, towards outward-looking participation in global trade and structures (Held and McGrew, 2003). The alleviation of poverty was not a goal of these loans, and the circumstances of the poor often worsened due to reductions in social spending and increases in food prices as subsidies were lifted (Vavrus, 2002, Stiglitz, 2007). The SAPs appeared to deny the development of the very services that were now under discussion. Growing criticism that SAPs were worsening life for the world’s poor, led to the World Bank adapting the SAPs at the end of the 1990s to Poverty Reduction Strategy Papers (PRSPs) which allowed for more domestic growth (Easterly, 2000).

A focus on human rights and rights-based approaches⁶ also came to the fore during 1990s framing development as a discipline in which people, rather than economies were placed at the forefront (Tomasevski, 1989, Jonson, 2005). Economic growth was still deemed to be a necessary feature of development, but it was no longer seen as an adequate measure.

⁶ Some key aspects of the HRBA -

- ‘It integrates human rights within the heart of decision-making for transformative change;
- It shifts development initiatives from a focus on the needs of people living in poverty to recognition of their equal rights to access resources necessary for their well-being and social inclusion;
- It tackles the unequal power relations underlying poverty and social injustice;
- It redresses the principle causes of exclusion and empowers those living in poverty to renegotiate their relationship with the State and other groups...’.

Source: Equal Rights http://www.equalinrights.org/content/hrba_approach.html 14-9-08

Rights-based approaches to development have been criticised though for ‘insistent individualism which ignores the social relations at the very heart of development’ (Tsikata, 2007:217) and for being used by agencies as a means for providing them with clarity in their approaches to development, rather than as a means for enabling the marginalised to influence their environment (Tsikata, 2007). It is argued that change needs to come from both the grassroots and the top to realise the conversion of a rights discourse into local practice (Garcia and Parker, 2006). Thus while a recognised framework of protection for the older person may be put in place it will not necessarily alter their status in the development discourse. ‘Justice, rights, fairness and obligations’ may help protect against oppression (Minkler and Cole, 1999:32) but they do not however provide a guide as to how the needs of different categories of people are met, and how one set of needs is set against another in order to prioritise resource allocation (Fenech, 2007). An alternative argument is made that vulnerable people ‘should receive special moral concern in the prioritisation of health care and services’ (Brock, 2002:283).

The progression to a human development approach, formulated by the UNDP and assessed by the Human Development Index (HDI) developed in 1990, was a much welcomed development from the former GDP-only assessment approach (Elson, 2001). While this provided a more comprehensive socio-economic assessment than GDP it is nonetheless constrained by its own limitations, encompassing only income, longevity, and education (Dasgupta, 2001). It is argued that the HDI fails to take account of the values, potential contributions and aspirations of people:

[A] recent empirical study ... showed that the HDI is poorly correlated with a range of important dimensions of life: mental wellbeing, empowerment, political freedom, social and community relations, inequality, work conditions, leisure, political and economic stability, and the environment (Alkire, 2007:4).

‘Wellbeing’ encompassing economic and non-economic aspects of life, health and autonomy, is today becoming a more considered objective of international development (Sen, 1999, Gough et al., 2007). It seeks to draw in needs and resources with subjective wellbeing, quality of life and happiness as indicators of poverty (Gough et al., 2007)⁷.

⁷ Sen uses ‘wellbeing’ to refer to ‘a person’s being seen from the perspective of her own personal welfare, as contrasted with ‘agency goals, which can include other goals such as pursuing the welfare of

Because this approach extends beyond productivity and economic interests it has the potential to include and address the interests of older people. Additionally it takes the debate beyond ‘human development’ and ‘human capital’, both of which can also be regarded as being primarily concerned with productivity. Human capital as a concept is often associated with constituting human beings as productive economic units. It has been suggested that this is reductive to those who are deemed to be economic, viewing people only as tools of production, and exclusionary to those, such as older people, who are deemed to be of little economic value but who may still be ‘developed’ as human beings (Barrientos, 2002, Dean, 2007).

1.3 Linking global discourse and local practice

The different interpretations of development, described at the start of section 1.2, present scope for misunderstanding that can result in the loss of effective progress in development programming and learning at both the global and local levels. The links between the development discourse and local practice require an understanding and appreciation of historical contexts, local circumstances and traditions; decision-making processes, and knowledge acquisition and dissemination (Grindle and Thomas, 1991, Burman, 1996, Pereira, 2002, Seshia and Scoones, 2003, van Kerkhoff and Szlezak, 2006, Jones et al., 2012). A number of studies, examples of which are detailed below, have shown how grassroots activity, in responding to known local circumstances, can be misdirected or unsupported by international bodies whose priorities and programming are dominated by a broader global discourse.

The lack of expertise in translating general concepts into action can contribute to a narrowing of interests (Pitanguy, 2002, Gilbert and Gilbert, 2004, Cheney, 2007). Unterhalter’s 2008 study, for example, on gender and education in South Africa and Kenya illustrated funders’ frustrations of grassroots-level practitioners not carrying out programmes as expected. The research revealed that local practitioners were unaware of

others’ (Sen, 1993:35-6, *Capability and well-being* in Sen, A., and Nussbaum, M., *The Quality of Life*, Oxford: Clarendon Press).

the global framework on gender relations being promoted in the education system, despite the fact that this was a significant part of the higher level policy area to which ‘their’ respective IGO was working. It further illustrated the consequences of inadequate transfer and interpretation of international guidance to the local level. Giffen and Judge (2010) noted in their study of civil society in LDCs that the increased efforts made by multi-lateral and bi-lateral agencies to inform local practitioners of their priorities increased the potential influence of CBOs and IGOs. Van Kerkhoff and Szlezak (2006) similarly argue that if policy makers were to share their priorities with local practitioners that this could help bridge a gap between discourse and practice. Learning systems are required that are able to link different areas of information and develop systems capable of taking on the ‘unsought for’ (Kerkhoff 2002:632). Quoting Grindle and Thomas (1991):

decision makers are not simply forced by events, to make particular choices, generally they have a significant range of options in the management of public problems – including at times the option of not addressing them (Grindle and Thomas, 1991:2).

This is certainly something that my research has borne out, as I argue in Chapters 10 and 11 where gaps between the discourse and local practice become evident in the case study.

The actions of global agencies do not stand alone: they link to each other, they respond to macro-economic policy and are influenced by their own understandings of local practices, colonial histories and political processes of the countries in which they work. Seisha’s (2002) comparative study of Indian agricultural policy in two different periods – the Green Revolution of the 1960s and the current period of bio-technology – shows how the shifting global political context of different eras and different processes in the higher reaches of policymaking substantially influenced local practice. International interests in India in the 1960s were concerned with security and post-colonial independent food production, resulting in a focus on the production of foods for domestic consumption. The authors noted that the activities of two major donors, the Ford and Rockefeller Foundations were important in creating an institutional framework for the Green Revolution. The biotechnology era, which began in the 1990s, by contrast, has been

dominated by global interests of economic growth and financial returns to multinational corporations with a move away from domestic interests (Seshia and Scoones, 2003). The outcome has been, to quote Seshia and Scoones, ‘a move from the involvement of relatively few players in the policy process to multiple players, including many non-state actors (such as NGOs, private sector corporations, the media), each with global connections’ (ibid 2003:iii). Despite the apparent continuities in the development discourse over the 25-year period covered by this thesis – such as older people are few in number and are looked after by their families - the situation for older people in LDCs is today considerably different from 1982

Bureaucratic constraints have been cited as a contributory factor in limiting knowledge transference from global debate to local practice, and vice versa. Van Kerkhoff and Szlezak (2006:629) noted from their study of the take up process of the Global Fund to Fight AIDS, Tuberculosis and Malaria (the Global Fund) that both the policy maker and the practitioner gained where there was a willingness to learn from the other.

The technical agencies argued that increasing demands on their staff in providing guidance to local level applicants meant they had no remaining capacity to draw lessons from implementation. Local implementers in turn, had to meet the Global Fund’s application requirements and monitoring and evaluation procedures, with little incentive to consider lessons that may inform others (van Kerkhoff and Szlezak, 2006:632)

The study showed how information was used from funding applications from grassroots projects to inform the broader policy agendas of public health organisations, as well as providing the means for meeting funding requirements. The Global Fund process indicated that acceptance and rejection of particular funding applications influenced the practices of projects. For example, an application which was turned down on its first presentation because it excluded a specific dimension, subsequently received funding when the organisation resubmitted it addressing the gap the second time around.

An iterative approach by which the global and local are linked through continuous learning from each other can maintain a dynamic capable of constant review of the potential gap between discourse and practice (Jones et al., 2012). The effectiveness of

local practice is enhanced by its ability to learn and transform local experience into knowledge which is also able to influence the global discourse (van Dijk, 1996, Cornwall et al., 2007). Studies have shown that an absence of mechanisms for active engagement by policymakers and officials wedded to existing practices inhibits both local and global progress, resulting in a loss of valuable lessons from small project to wider application.

The above studies all address already well acknowledged issues in international development: public health, gender, education, agriculture, food policy and rural development. Exploring the relationship between discourse and practice in an area of invisibility remains a challenge. Jones et al (2012) suggest that a complex combination of factors has to be taken into account, which will require understanding the processes behind a seeming lack of political will to effect change and acknowledgement of the interplay between internal and ‘external forces [that] often go way beyond the basic supply of funding’ (ibid: 39). This presents additional challenges in taking forward a development and ageing agenda, where there is little development theory which addresses the interests of older people, and a seeming unwillingness to engage with the local level to learn more of the experience of the changing circumstances of the lives of older people. The discourse analysis and case study carried out for this thesis contribute some examples in practice to addressing this challenge.

1.4 Concluding comments - bringing the theoretical perspectives together

This chapter has so far reviewed the main theories in the separate fields of ageing and international development. These are summarised in Tables 2 and 3. The tables are not intended to imply a linear progression in either discipline or to suggest that movement from one phase to the next implies the shedding of ideas entirely from the former. Competing demands and interests, different histories, and the capacity, will and power to influence change impact on the speed of movement between the paradigms and on the concomitant policy and practice of agencies (Grindle and Thomas, 1991, Pereira, 2002, Pitanguy, 2002, Unterhalter et al., 2008).

Table 2 Development paradigms and applications

Time period	Development Paradigm	Core purpose	Driving development policies	Nomenclature
1960s	Economic Development: growth	Growth – increase GNP/GDP	Industrialisation	Developing Countries; Third World
1970s	Economic Development: Basic Needs	Targeted poverty programmes	Statist and redistributive	Developing Countries; Third World
1980s	Sustainable Development	Meeting today's needs without jeopardising future generations ability to meet their needs	Self-sufficiency Liberalisation of trade and markets	North-South
1990s	Human rights and human development	Empowerment, democracy	Keeping people at the centre of development	Rich and poor countries
2000s	Poverty reduction	Improving the lives of the very poor	MDG targets	Low and middle income countries (LMICs)

Table 3 Gerontology paradigms and applications

Time period	Gerontology Paradigm	Core purpose	Driving ageing policies	Nomenclature
1960s	Bio-medical	Maintain physical health	Safety and maintenance	The elderly
1970s	Social	Care and social engagement	Redistributive: providing benefits and home support	Pensioners
1980s	Community engagement	Participation	Independence	Senior citizens
1990s	Active ageing	Independence in old age	Self sufficiency; Care in the community	Older people
2000s	Critical gerontology Rights	Increased personal control	Person-centred	Older people

Although the research and theory to date in gerontology and in development are broadly separate there are some indicators of common history and cause. At the heart of each is a

recognition of power relations in society, in which either the rich dominate the poor, the economically active dominate the inactive, or the physically capable dominate the less physically able (Hall, 2001). Chapter 3 will discuss how these power relationships are sustained through the construction of language and unquestioned assumptions.

Both disciplines have experienced theoretical shifts from using the positive but limited term 'successful' as an indicator for progress in their respective fields. In both fields the term proved to lack subtlety and the ability to distinguish between the lived experiences of individuals in complex situations (Tomasevski, 1989, Minkler and Cole, 1999). Both disciplines were similarly affected by the economic crises of the 1980s during which responsibilities for collective and individual wellbeing moved away from the state to the individual and from welfare to independence (Corbridge, 1995, Victor, 2005, Stiglitz, 2007).

It has been suggested in both gerontology (Johnson, 2005, Victor, 2005, Powell, 2010) and development (Kothari and Minogue, 2002) that while there have been many new approaches and instruments to improve practice in both disciplines there has been little new theory in either field over the last 50 years. Gerontology has been accused of being 'data rich but theory poor' (Johnson, 2005:xxiii), providing new generations of studies which develop and improve expertise in responding to the interests of older people but not offering new theoretical models of how to view ageing societies or to appreciate and respond to the actual lived experiences of individual older people (Katz, 1996, Johnson, 2005). There has been little joint work on how the global changes associated with growing urbanisation, increasing life expectancy, or migration, for example, have either affected the lives of older people or how they should be regarded and involved in the new global society (Phillipson, 2003). Similarly there is scope for a common appreciation that ageing and old age are no more homogeneous experiences, than the 'poor world' shares a single experience – geographical regions are at different stages of development, there are inequalities between regions, within regions and within countries (Vos et al., 2008, Lloyd-Sherlock, 2010).

Chapter 1 has begun to indicate some of the reasons for the nature of older people's representation in the development discourse, most fundamental of which are a power relationship which privileges those engaged in formal economic activity in society over others deemed to be unproductive; and an absence of epistemological tools that militate against influencing new debate. Chapter 2 takes forward the linkages between ageing and development and identifies areas of specialist research that are relevant to exploring old age and development. These are reviewed in section 2.2 of the next chapter. Before engaging with this the chapter opens with a conceptual view of 'ageing and development' so as to provide consistency and clarity to the use of these terms throughout the thesis.

Chapter 2 Connecting Ageing and Development

It is essential to the outcomes of this thesis that a clear distinction is made between the meanings and implications of the different terms. A review of the literature and policy documentation produced by international bodies working in development sometimes suggests a conflation of the terms ‘ageing and development’, ‘old age and development’ and ‘older people in developing countries’. For example, the term ‘ageing’ may suggest an accompanying reference to older people. ‘Ageing’ is commonly used in the context of global population change in relation to populations and individuals becoming older. This concern however is with the *process* of ageing, rather than with individuals who are old or will become old (Pool, 2008).

The interest of this thesis is with a macro analysis of how older people have been and can be included in the development paradigm. ‘Ageing and Development’ has been defined as ‘a field of research, policy and practice that focuses on the ‘problem’ of rapid population ageing, the needs of older people, and the question of how those needs can be met by governments and NGOs’ (Vera-Sanso and Sweetman, 2009:368). This is distinct from the micro level research about older people in LDCs, which provides essential data about the experiences of older people to inform policy formulation. Chapter 2 thus opens with a section on definitions: distinguishing between who is being discussed when the terms ‘ageing populations’ and ‘older people’ are used, and the different paradigms in which these terms are used.

2.1 Ageing, elder, old age and older

There are no universally accepted definitions of ‘older’, ‘old’ and ‘aged’ (Heslop and Gorman, 2002, Bowling, 2005, Lloyd-Sherlock, 2010). The terminology used to describe older persons varies considerably in international documents including, for example, the terms ‘older persons’, ‘the aged’, ‘the elderly’, ‘the third age’, ‘the ageing’, and, in order to denote persons more than 80 years of age, the term ‘the fourth age’. ‘Older persons’ is the term currently employed in UN General Assembly resolutions on ageing. ‘In most

times and places people have been judged to be 'old' when they could no longer support or look after themselves, when the faculties essential for survival in adult life were failing. It has always been recognised that it occurs at very diverse ages' (Thane, 2005:17).

Ageing can be considered from two major perspectives: demographic and individual. The former is concerned with the process of a population ageing, while the latter is concerned with the ageing process of an individual through their life course (Huber, 2005). Chudacoff (1989) further breaks down individual ageing into the interaction of two states: the personal physical and psychological changes that an individual experiences and the socio-cultural environment an individual shares with their cohort group (Chudacoff, 1989).

Conventional measures of ageing are based on chronological age (Lutz, 2008). For example, for the purpose of demographic studies, the UN identifies individuals who have reached 60 years of age as 'older persons' (Huber, 2005). Eurostat, the statistical service of the European Union, considers 'older persons' to mean persons aged 65 or above, in recognition that this is the most common age of retirement (UN, 1995b). Others suggest that 60 should be taken as the entry point to old age, on the grounds that life expectancy is shorter in LDCs than in developed countries (Chakraborti, 2004). Using retirement age as the determinant for old age presents methodological difficulties too, as retirement ages vary from 55 to 65 across the world (Victor, 1987). There are two fundamental weaknesses in using chronology as a single measure of old age. Firstly, it assumes that age has an absolute, rather than a relative meaning, and secondly that it has contributed to ageism (Baars, 2007). The assumption that the figure represents the same relationship to age in any place at any point in history, assumes for example that a '60-year-old person in 1900 was just as old as a 60-year-old person in 2000 because each has lived the same number of years (Lutz, 2008:1). The quality of those lived years will have been different, and the 60-year-old living in the developed world in 2000 would, on average, have many more remaining years of life (Baars, 2007). Gerontologists have argued that the emphasis in the West on a statutory retirement age has probably played a role in

contributing to ageism because of the enforced separation from the mainstream of society, namely from those who are in paid employment (Walker, 1981, Fennell et al., 1988).

Social and cultural perspectives on age and ageing also contribute to the way older people are represented in the development discourse (Lloyd-Sherlock, 2010). As a western-influenced discipline it is likely that the perspectives that 'western' developed trained theorist and practitioners bring with them to developing countries may reflect the normative views of older people in western countries (Lipman, 2005). Further, as older people continue to be economically and socially productive in most of the developing world they may simply be viewed as 'adults' rather than a separate category (Ebrahim, 2010). In the same way that childhood has become recognised as a distinct life stage by development agencies (Theis and O'Kane, 2005, Boyden, 2006), so older people have yet to be deemed to have requirements over and above their physical needs.

What constitutes old age is thus often not related to chronology but to function and capacity in conjunction with the role and status attributed to elderly people within society. Greater subtlety is required to appreciate the differences of how 'old' is determined and considered in different cultures and how different terms are used. The traditional idea that tribal societies are dominated by the old because of the use of the term 'elders', can be misleading.

'Often when we read of decisions being taken by the village elders ... the elders are vigorous men in their late 40s. Even where the people are ruled by a council of elders it is thus possible for the really elderly men to carry no weight' (Douglas 1963:13 in Fennell 1988:10).

Rather than just a matter of age, each society and culture constructs its own meanings, ascribing different characteristics at given stages in life (Victor, 2005). 'In contrast to the chronological milestones which mark life stages in the developed world, old age in many developing countries is seen to begin at the point when active contribution is no longer possible' (Gorman, 1999:7). It is also the case that chronological age is not a helpful social tool in parts of the world where many people neither know their age nor do they

have the relevant documentation, and where self-assessment of one's age is common (Williams, 2003). In many African cultures, for example, age assessment is made with reference to stages of personal and family life, rather than to economic stages, and there is usually no consensus on the precise ages at which transitions from one life stage to another occur (Makoni, 2008). In some instances people also intentionally underestimate their age to keep themselves employable (Vera-Sanso et al., 2010).

Because of the wide variety of life experience populations are at their most diverse in old age. They are a widely varying population with occasionally contrasting and even conflicting priorities, although they may to a degree act as a group through socialisation and community of interests (Megret, in press 2011). Perspectives on older people are as varied as are old people. In international development older people are considered to hold wisdom, to be a block to development due to their traditional views, as dependent and childlike, and are deemed not to have the capacity to learn new things or adapt (Chakraborti, 2004). Attitudes and experiences both towards and among older people are structured by class, gender, ethnicity, health, disability, religion, geography, age, household structure, education and income (Arber and Evandrou, 1993, Sen, 1994, Bengston et al., 2005, Bowling, 2005, Sokolovsky, 2009). With increasing numbers of older people and the spread of cultural influences and change there is an even greater increase in diversity of older people and in their circumstances. In addition family sizes differ: they are smaller in East Asia than Africa, where fertility is still higher (Treas and Logue, 1986, Dyson, 2010). The costs of children are more widely diffused in many countries in sub-Saharan Africa (Cleland, 2008). These different circumstances will require different responses, including necessary attention to health care, housing and opportunities for participation and engagement in society (World Bank, 2008).

At the same time as recognising that there are difficulties in providing absolute definitions of 'old', 'older' and 'aged', there are ways of managing this depending upon the requirement for the definition. Thus definitional clarity for age related data may need to be examined and agreed upon when designing research studies, for example, developing social policies or advocating for a change in attitudes (Baars, 2007).

2.2 Research on older people in LDCs

Research with the potential to influence social policy and practice for older people in LDCs broadly falls into the bailiwick of three groups (i) gerontologists in the West; (ii) gerontologists in LDCs; and (iii) researchers from other disciplines with an interest in ageing issues in LDCs. These three groupings reflect different purposes and priorities, and hence outcomes for older people.

Section 1.1 noted that gerontology theory, research and practice have been primarily western dominated and concerned with older people in developed countries. There have been theories on bio-medical approaches to ageing, disengagement, participative, active and successful ageing to blend with western societal views of the position and status of older people in order to ‘know’ how to ‘manage’ them. The growth in numbers of older people in the West is also generating an increasing number of studies of ageing from the perspective of older people (JRF, 2004, Andrews, 2009). In relation to expressions of interest of ageing and older people in LDCs western gerontology, has to date focussed primarily on globalisation and its impact on ageing societies in both developed and developing countries (Phillipson, 2003, Walker, 2005). Globalisation, defined here as the rapidly growing interaction and interdependence between nation states (Held et al., 1999) ‘has become an influential force in shaping responses to population aging’ (Powell, 2010).

Both developed and developing countries alike are acknowledging the phenomenon of globalisation in their attempts to deal with the complex relations of correspondence and contradiction emerging from populational aging (sic) (Powell, 2010:4)

It is impacting directly on global ageing on matters associated with migration, company and government pension schemes, social institutions, provision of health care and housing, and science and technology (Held et al., 1999, Warnes, 2004)⁸. Walker (2005) has described how trans-national bodies influence and shape national policies, citing, as

⁸ Warnes (2004) migration studies concern the change in status of people who become old in another country and those who are left behind when younger members of the family seek employment in other countries.

an example, the recommendations of the World Bank to introduce a reduced role for 'pay as you go' pension schemes. In the 1980s Fennell drew attention to three social trends that were influencing the lives of older people in developed countries: segregation between age groups and classes, increasing living standards and widening social cleavages (Fennell et al., 1988). These trends have an increasing resonance with developing countries today as a result of globalisation. There is greater separation between generations as younger people move to the city while the elderly remain in rural areas; there have been huge increases in living standards in a number of developing countries, notably across Asia; and the ever changing developments in communications and accessibility to information and services is creating chasms between the haves and the have-nots (Stiglitz, 2007). The ways in which taxes are raised from corporations, the supply of goods and services these bodies make available for ageing societies and the change in global communication systems are also all impacting on the lives of older people.

The response of the West to social problems has often been to look to the state for support. Phillipson (2005) and Walker (2005) suggest, given the huge impact of globalisation on the provision of welfare support, that it would be appropriate to consider a political economy of ageing approach to ageing and development. There are two potential difficulties with this at the current time. First, a system that looks to the state as the source of support is not a viable option for LDCs, nor likely to be, because of limited availability or allocation of global and national resources. Second, a system that places the locus of responsibility on the state rather than the community does not fit with current perspectives in LDCs on how support for older people should be provided (Hashimoto and Ikels, 2005).

Phillipson (2001) usefully distinguishes between global ageism and global ageing and thence the need to offer policy analysis and solutions able to meet these different understandings. He highlights the impact of global institutions on ageing populations and the need to look for global answers.

[A]geing must be viewed as a global phenomenon ... we need to be clearer about the way in which global institutions and global governance might be used to promote the needs and rights of older citizens (Phillipson, 2003 para 5.9).

There have been benefits for older people too arising from globalisation, particularly in relation to technology and communications, which may enable families to maintain contact as they migrate to the city or to another country. This is distinct though from considering the impact of globalisation directly on older people in LDCs.

The second interest group comprises a small but growing body of gerontological research within individual LDCs, most notably in Latin America, South Asia and East Asia, which is critical of the usefulness of these approaches to LDCs (Chakraborti, 2004, Vermani, 2004, Hashimoto and Ikels, 2005, Okoye, 2005, Alam, 2007, Liu and Guo, 2008, Sanchez, 2008). The theoretical models, as in international development, are dominated by western academia and culture (Eyetsemitan, 2002, Das et al., 2008a, Das et al., 2008b). Das et al suggest that 'in western culture the markers of successful ageing are fulfilment of one's potential, self-sufficiency, individual freedom and a choice to live according to one's wishes' (2008:5), whereas in the 'eastern' context 'successful ageing' is associated with the satisfactory completion of family duties and obligations. Similarly, wellbeing is used to indicate quality of life not only with reference to the health and happiness of the individual but to the social role that they play (Distaso, 2005, Molzahn et al., 2010). The recently established African Ageing Network (AFRAN)⁹ builds on the early work of gerontologists across sub-Saharan Africa (Ferreira, 1999, Kaseke, 1999). A number of current studies explore the experiences of ageing and changing perspectives on old age in local communities (Laws and McLeod, 2004, Okoye, 2005, McGadney-Douglass and Douglass, 2008). Okoye's study in Nigeria of younger people's views of older people showed that younger people still feel responsible for the older members of their families but decreasing numbers think they should be living with their parents or elderly family.

⁹ AFRAN, established in 2005, brings together researchers from across Africa. It is supported by the Oxford Institute of Ageing.

Older people are also seen as losing their status as holders of wisdom, and areas in which they were valued highly are no longer of great importance.

Education has improved people's awareness to the point that they no longer depend on the elderly for advice and other duties, ... Women are no longer expected to stay at home rather they now work outside the home and also contribute a lot to the upkeep of the family... their primary role before as caregivers is no longer possible. From the study....in as much as the respondents may have imbibed modern culture they still believe that they have a duty towards their parents especially as a reciprocal gesture for the nurturing they received when they were young (Okoye, 2005:7).

In addition, contrary to a popular view that the young always gain from older people, Okoye's report noted that old people can be a 'bad' influence on younger people because of their 'complaining' about changing times.

The third area of interest comprises the increase in studies of ageing in LDCs that are focussing on specific economic and social policy issues impacting on the lives of older people. The areas covered include social protection, encompassing livelihoods and pension arrangements (Palloni, 2001, Devereux, 2002, Lloyd-Sherlock, 2004, Barrientos and Hulme, 2008); health, the life course and active ageing (Kalache et al., 2005); HIV/AIDS (Okatcha, 1999, HelpAge International, 2003); and elder abuse (WHO, 2002b). There are also anthropological studies of particular groups illustrating intra-familial relationships (Vera-Sanso, 2004a, Shaibu and Wallhagen, 2005) and living arrangements (Palloni, 2001); and how older people receive support in their communities (Schröder-Butterfill and Kreager, 2005, Yap et al., 2006). While such studies examine a particular group or groups, they do so with an aim of elucidating issues of wider relevance and often raise both methodological concerns in researching the circumstances of older people and policy issues that have a bearing on development (Vera-Sanso, 2004b).

The growing body of literature on ageing in discrete areas of activity, coupled with policy and practice initiatives, provides evidence of the changing status of older people in their local communities. This evidence is critical for revealing the nature of support that may be needed by older people.

2.3 Convergence of Gerontology and Development

This section draws out areas of commonality in gerontological and development policy and practice. The literature review suggests the two disciplines of gerontology and development share similar motivations while employing different terms that reflect the social and political circumstances of their respective foci of interest. Figure 2 below presents a summary of the commonalities between the two disciplines (column one).

Figure 2 Contingent global discourses in gerontology and development

GERONTOLOGY Language in use	COMMON PRINCIPLE or CONCEPT	DEVELOPMENT: Language in use
User involvement	Agency/engagement	Participation
Social inclusion	Development	Social transformation
Enabling	Empowerment/transfer of power	Freedom
Equalities	Human Rights	Rights-based approach
Health	Life course	Economic
Deprivation index	Poverty	Basic needs
Individualism	Self-actualisation	Human development
Pensioner movements	Solidarity	Grassroots movement
Maintaining independence	Sustainability	Productivity
Quality of life	Wellbeing	Capability ¹⁰
Benefits/pension	Welfarism	Aid/social protection

¹⁰ See Coast et al (2008) re: development of capability measures for older people

The first and third columns indicate the language used by each of the disciplines to realise the concepts in practice. A sample of these is expanded upon below. The force of economic imperatives is pervasive in both gerontology and development with its emphasis on the free market, the withdrawal of the state, and its determination to make individuals responsible for their futures, using the language of choice and empowerment (Stiglitz, 1998, Powell, 2001, Walker and Deacon, 2003). Welfarism, for example, is an expression of interventionism that seeks support those unable to provide for themselves. It is provided as a statement of society's responsibility to others rather than as a charitable act (Devereux, 2002). In the field of ageing in the West this translates into state benefits or pensions; in international development such interventionism translates into aid. The global agendas and discourse around welfare delivery and poverty alleviation which are departing from earlier notions of state responsibility, and place the individual at the centre of new models in which traditional family values have acquired a new salience in both development and gerontology (Molyneux, 1998).

From the social perspective both have been subject to shifts in the dominant policies of the time which have ranged from charitable largesse, through participation and enabling, to human rights, and wellbeing (Gough et al., 2007). In both arenas participation and engagement have been perceived as essential for sustainable progress and both disciplines value 'empowerment' as part of a process for increasing autonomy and respecting dignity (Cooke and Kothari, 2001). Cornwall et al (2007) argue that 'empowerment' has been used as a means of letting people 'get on with it' themselves, through self-help groups, or just as increasing 'choice'. Within the arena of individual and community agency, often expressed through grassroots activism and community development, the shared activities between gerontology and development are contained in the use of the terms 'participation' in development and 'user involvement' in ageing. Participative mechanisms such as Rapid Rural Appraisal (RRA) and Participatory Rural Appraisal (PRA), which have been in use in LDCs since the 1970s were however generally concerned with hearing the collective voice of people on proposed public projects, albeit through their gathering individual experiences (Francis, 2001). Studies of how people view their quality of life is a relatively new initiative in LDCs (Bullinger and

Schmidt, 2007). The studies of older people (Coast et al., 2008, Molzahn et al., 2010) in which the end user group plays a substantive role in designing measures that apply to their own lives, rather than to the goals or interests of an agency, could be of wider value in development (Gough et al., 2007).

Both disciplines have adopted approaches using a human rights framework to further the interests of their respective constituents of interests and for offering better outcomes towards creating a life in dignity for all. Human Rights has had a significant position in the discourse in international development since the 1980s, finding expression in the 1986 UN Declaration on the Right to Development and at subsequent UN Conferences on human rights. The acknowledgement of human rights relating to older people has been more recently realised in UK (2000) and European (1998) equalities and anti-discrimination legislation (Matthews, 2011) and in the pursuance of an international convention for older people (Megret, in press 2011). In their work on the rights of the child James and James (2004) note that one of the values of The UN Convention on the Rights of the Child, is the bringing together of 'universal concepts of humanity, and the universal rights associated with the value and status of being human independent of chronological or generational considerations' (James and James, 2004:82). Recognising the fundamental links between poverty, access to resources, rights and capabilities in development (Gready and Ensor, 2005), HelpAge International has noted that poverty and social exclusion constitute the main impediments to the realisation of older people's human rights worldwide' (HelpAge International, 2000). James and James (2004) have noted that international legislation for older people, such as a Convention, would reflect a more coherent global acknowledgement of issues affecting older persons. Though a human rights agenda has the potential to legitimise the protection of difference its attention on the individual has the power also to deflect from examining and changing social relations and the hierarchical relationships of groups within society (Pereira, 2002, Pitanguy, 2002, Tsikata, 2007).

Parallels can be also drawn between the anthropological approach to international development and ageing, and gerontological scholarship in the area of racial and ethnic

diversity (Blakemore and Boneham, 1994, Baars et al., 2006). It has been suggested that studies of minority groups have tended to the anthropological approach by limiting themselves to examining individual and group differences, rather than looking more deeply at the structural realities and power relationships between privileged and oppressed groups that underlie these disparities (Kabeer, 1994, Holstein and Minkler, 2007, Sokolovsky, 2009). New ways of exploring how the structural and social interactions within communities in LDCs are impacting on the lives of older people are beginning to emerge. Vera-Sanso's (2010) work in India demonstrates how the circumstances of the aged are often constructed by poverty and Schröder-Butterfill has developed a qualitative survey for identifying support systems beyond the immediate family. Many of the LDCs are either unable to provide the necessary support for their older populations or to do so would consume a disproportionate amount of their GDP. Given their limited funds, it is difficult for policy-makers in developing nations to address fairly the social objective of protecting vulnerable older people while remaining consistent with development strategies giving priority to the promotion of capital markets and investment in the current and future labour force. As indicated earlier policymakers often feel that they must choose between the needs of multiple vulnerable groups, such as mothers, children, adolescents, and older persons (Engelman and Johnson, 2007). A global political economy of ageing perspective may provide a helpful analysis of the status of older people in LDCs, as perceived by the West, though it has been suggested that the interest by global organisations and initiatives on ageing may be more a reflection of the need to maintain western prosperity, than of supporting growing older populations in the LDCs (Vincent, 2006). A suggestion that in the absence of a global allocation of resources for older people, LDCs could continue to seek, on the short-term, localised support of bi-lateral donors may only serve to increase their resourcing problems by furthering their dependency on other nation states (Walker, 2005, Holzmann and Hinz, 2008).

Finally it also possible to discern parallel histories in the changing assessment paradigms, in which both disciplines have moved from quantifiable measures, such as life expectancy, morbidity and economic indicators, to the broader dynamics and value of

life. In gerontology this has been presented in behavioural theories, wellbeing, and successful ageing; and in development, represented by approaches in human development, human rights and social inclusion. Between them the main approaches currently in use, Quality of Life Indicators, the HDI, Capability and Wellbeing (Sen, 1999, Alkire, 2007, Gough et al., 2007, Coast et al., 2008) focus on health matters, levels of literacy, life expectancy and skills development for employment.

Summary of Part 1

Part 1 has presented a brief review of the dominant theories of gerontology and development over the last 50 years. It has shown that older people have rarely been represented in the literature in development theory or practice. The emphasis in society on economic growth and productivity has had a pervasive negative effect on the thinking about older people as either not being of economic value to development (Chakraborti, 2004:195), or as ‘structural dependants’ with little social status (Townsend, 1981, Walker, 1981).

It has indicated parallel developments and shown their respective overall approaches to be moving from primarily scientific and normative epistemologies to more person-centred and holistic approaches. The progress of the main approaches in gerontology moved from medical, to social, economic and political. By contrast economic approaches have dominated development, and the case for the centrality of social policy in development as the means for providing the crucial link between poverty eradication and equity is quite recent (Mkandawire, 2004).

Areas of intersecting interests in policy and practice have been identified, though these parallel paths have yet to converge in an approach that could be termed ‘ageing and development’. The parallels have been most readily examined in the literature on ageing and globalisation (Deacon, 2000, Powell, 2001, Phillipson, 2003, Warnes, 2004, Walker, 2005), and in human rights (Butler, 2002, Megret, in press 2011). However insufficient

attention is being paid in the literature to distinguishing between global ageing, which tends to look to future older generations, rather than today's global older population. There is no indication in development theory that it has set out to exclude particular groups. But the measures of 'successful' development (primarily using GDP and the HDI) eliminate elements that are of critical relevance to older people: wellbeing, security (including age abuse and the impact of war), equality (McGadney-Douglass and Douglass, 2008); and the ability to contribute to political and social relations (Alkire, 2007).

In the context of globalisation it is timely that gerontology moves beyond its traditional nation-state perspectives and looks at the impact of changing world relations on the lives of older people in all parts of the world (Phillipson, 2005). Walker (2005) argues it is no longer possible to separate out the nation state from the rest of the world. He notes that in contrast to the way that they comment on UK and European welfare systems and government policies, western gerontologists rarely note globalisation and inter-government organisations and activity (Walker, 2005:818). There has been an apparent move in the last 20 to 30 years from research concerning older people in LDCs having appeared almost exclusively as studies in age specific journals, such as *Ageing and Society*, *Research on Ageing*, *BOLD*¹¹, *Ageing International*, to a broader focus within arenas concerned with the economic and social implications of ageing populations. This has been evident as the economic and financial constraints facing governments of LDCs are becoming more apparent (World Bank, 1994, Holzmann and Hinz, 2005) and within the field of global social policy (Deacon, 2000, Walker and Deacon, 2003, Lloyd-Sherlock, 2004, Phillipson, 2005, Walker, 2005, Barrientos and Hulme, 2008). This increased visibility of older people in the public domain is, particularly in relation to pensions, social care and the productive role that older people play in their communities, development theory has yet to acknowledge the changing needs of an ageing population.

There is some international activity in respect of older people, most notably the Madrid Plan of Action which emerged from the Second World Assembly on Ageing in 2002 and

¹¹ BOLD is the journal of the International Federation on Ageing

the ongoing advocacy and service support provided by the international non-government organisations, such as HelpAge International, the International Federation on Ageing and the International Institute of Ageing, towards meeting the interests of older people.

There are however no legally binding international agreements promoting or protecting the interests of older people or international levers for exerting influence on the activities of international and national governments on behalf of older people and ageing populations. Walker (2005) finds the major inter government organisations (IGOs), wanting in their approaches and responses to older people accusing the International Monetary Fund and World Bank of leaving behind older people as they simultaneously seek to encourage the growth of global markets and discourage state provision of financial and social support (Walker, 2005). Walker does however afford the UN and its agencies a more sympathetic response, on the grounds that their message and work are underpinned by human rights concerns. 'What is certain is that the current dominant approach to development is part of the problem and not the solution.' (Walker, 2005:825).

There are positive moves in both arenas though about how people should be viewed in society and the roles that they can play. The normative position has broadened from one in which the 'beneficiaries' of both gerontology and international development were objects of medical and material attention to one in which wellbeing, participation and acknowledgement of differences are part of the debates in the theory and practices of gerontology and development. Viewing this in the context of possible theories of ageing, the focus remains in the domain of economics, in harmony with the earlier dominant theories of development. Development does not appear to have applied its more recent policies and practice of equality, social inclusion, wellbeing, human development and human rights to older people. Where there has been an interest in older people it appears to rest on the economics of old age, rather than on the quality of life of older people collectively or as individuals. As Fenech noted in a paper he presented at Conference on Population and Development Co-operation in 2005:

Policy-makers gazing into crystal-balls may well raise the spectre (sic) of a crippling burden in health and welfare costs, fearing that a diminishing pool of carers and the growing dependence of more old people will lead to intergenerational stress and ageism. Ageism is sadly still with us (Fenech, 2005:10).

The above literature review reveals opportunities for examining further the intersection of policy and practice in gerontology and development at the current time. As much about older people and development lies in that which is not stated, a systematic review of seminal development policy documents could contribute to understanding how and where older people are represented and discussed in international development. The next part of the thesis presents the theoretical framework that will be used to examine the representation of older people and will draw on the experience of a parallel discourse of women and development.

PART II Making the invisible visible: conceptual approaches

Part II presents the theoretical framework to be used in this thesis for identifying the locus of older people in development in relation to other groups. As already indicated in the previous sections older people were either invisible or rarely mentioned in the changing policy narratives, and when referred to were often part of a different discourse, as carers, for example, of those affected by HIV/AIDS (Reid, 2005). The representation of older people, as indicated in Section 2.1, was also seen to vary: from being wise elders to being welfare-dependents, and from being valued carers to being an economic burden. Research among different groups has shown that ignorance about ageing and older people has reinforced false beliefs about being old (Scott et al., 1998, Andrews, 1999). Gerontology's focus on the bio-medical and dependency discourses of the 1970s and 1980s, in which older people were primarily seen as requiring support and care from the state, contributed to such beliefs (Arber and Ginn, 1991, Powell and Biggs, 2003). An accompanying focus on physical institutions in the form of hospitals, nursing and residential homes and day centres reinforced attitudes that older people were helpless (Hall, 2001). Such representations and constructions determine how a group may be regarded and subsequently treated by different sections of society (van Leeuwen, 1993, Wodak, 1996).

The elements to unravel in Part II are the means by which older people have been represented, or not, in the development discourse and the ways in which such representation have been sustained. An epistemological approach using Critical Discourse Theory will be used. Critical Discourse Theory (CDT) is generally concerned with power, dominance, hegemony and inequality and the 'discursive processes of their enactment, concealment, legitimation and reproduction' (van Dijk, 1993:131). A critical analysis of the discourse on development can help understand how the construction of the language of development contributes to the marginalisation and low visibility of older people (Kendall, 2007)¹² as well as revealing hidden structures of power relations (van

¹² 'Critical' is defined as 'opening up complexity and challenging reductionism' Kendall, 2007 para 38.

Dijk, 1993, van Leeuwen, 1993, Fairclough, 1995, Wodak, 1996). Leeuwen's definition of discourse as 'the instrument of power and control as well ... as the instrument of the social construction of reality' (van Leeuwen, 1993:193), is the understanding of discourse that will be used in this thesis.

Organisations working in development, frequently find themselves adopting new and changed usage of vocabulary. The repetition of new terms is more than keeping pace with new terminology: it reflects the prevailing way of thinking; and conversely choosing to repeat old terms and language in favour of new terms perpetuates certain attitudes (Chambers, 1997). Adherence to the term 'the elderly', for example, rather than to the newer term 'older people' could indicate an unwillingness to understand different representations of older people (see Section 2.1). The words that organisations use and the situations in which they use them have the power to control circumstances, to effect change or to influence mindset and decision making (Fairclough, 1996, Ebrahim A., 2004). Chambers (2004) has noted that:

The power of vocabulary to change how we think and what we do is easy to underestimate. It influences the course of development in many ways: through changing the agenda; through modifying mindsets; through legitimating new actions; and through stimulating and focusing research and learning (Chambers, 2004:4).

The ways in which older people are represented informs policy that is directed towards older people, such as domiciliary and institutional care arrangements, and to policy that affects them, such as transport and access to public amenities. The continued use of terms such as 'the elderly' that portray older people in the abstract, or the continued absence of reference to older people in other policy arenas, may in turn reinforce the absence of older people in the development discourse.

Part II is composed of two chapters. Chapter 3 takes an overview of discourse theory and examines how the use of language signifies hidden and unconscious meanings, which in turn have an impact on the understanding and interpretation of others. Chapter 4 looks at the experience of women as an exemplar of how a group, also traditionally marginalised as a consequence of a biological given, has progressed from the margins of discourse to a

more central place within development rhetoric, policy and practice. The purpose of the comparison is to identify possible areas of learning and change that could benefit the situation of older people in development. Part II concludes with a summary of the main points from Chapters 3 and 4.

Chapter 3 Critical Discourse Theory

The absence, invisibility and marginalisation of a social group indicate a relationship of institutional power and dominance (Fraser and Honneth, 2003). Critical discourse theory provides this research with an understanding of the construction of these power relationships in the development discourse and the capacity to examine how the discourse is able to marginalise a particular group of people (van Dijk, 1993, Fairclough, 1995, Wodak, 1996). Van Leeuwen (1993) has argued that discourse is both the instrument of power and control as well as the instrument of the social construction of reality' (ibid: 193). Exploring and placing the nuances of institutional practice in a social context will contribute to appreciating linkages between a global discourse and local practice.

Wodak (1996) argued in her study of racism in Austria that communication was themed around three factors: deviance, difference and perceived threat. In research on racism, racist practices are understood to be present when they serve to 'establish social, political and economic practices that preclude certain groups from material and symbolic resources' (Hall, 1989:913), resulting in the practice of exclusion (Wodak, 1996). Ageism is a more confusing term because it is a term that is relevant to all ages in all societies. It tends to be used in relation to older people signifying ways in which older people are discriminated against (Bytheway, 1995). It presents a social perception that is an ensemble of elements, creating the group called 'older'. In Arber and Ginn (1991) a number of reasons were posited concerning the invisibility of older people in sociological theory. These could be classed into two broad categories: theoretical reasons and reasons relating to the work and productivity status of older people. Historical reasons argue that there were not many older people in previous generations, that it has only been relatively recently that old age has been seen as a distinct life stage, and that few older people lived alone (Ebrahim, 2010). The second category reflected the work and productivity status of older people who were not considered to be economically productive and therefore did not appear in most statistics, which were traditionally confined to working age people. Older people were thus invisible in sociological studies.

Critical discourse analysts view language as a social practice: that it is both a mode of action and it is situated in a historical and social context. In other words language is always relational, and is, as Fairclough has termed it, ‘constitutive – it is socially shaped but also social shaping...Language is always simultaneously constitutive of (i) social identities (ii) social relations and (iii) systems of knowledge and belief - though with different degrees of salience in different cases’ (Fairclough, 1993a:134). Discursive practices are said to become the rules of what can or can not be said, rather than the content of the language itself, so that what is acceptable changes over time and becomes reflected by the discourse of that time (Wetherell et al., 2001, O’Farrell, 2007). Foucault argued that it is thus necessary to apply a ‘meticulous observation of detail, and at the same time a political awareness of small things for the control and use of men to reach the underlying picture’ (Foucault, 1991:141). In so doing ‘taken for granted’ assumptions can be broken down. Poststructuralists argue that the telling of ‘a story’ itself holds meanings other than those exposed on the surface. For example how language around a topic has been constructed, who constructed it, which groups of people have made the claims that older people have needs and who has been defining what constitutes needs, have all contributed to the position that older people hold in society. Hence, the ways in which ageing and longevity are spoken of and written about determine the understanding of older people (Powell and Biggs, 2003). Fowler (1996) proposed analysing public discourse ‘to get at the ideology coded implicitly behind the overt propositions, to examine it particularly in the context of social formations’ (1996:3). CDA allows for the examination of this and the relationship between discourse and power, and ‘enables us to describe and explain how power abuse is enacted, reproduced or legitimised by the text and talk of dominant groups or institutions’ (Van Dijk, 1996:85).¹³

¹³ Fairclough describes CDA as ‘discourse analysis which aims to systematically explore often opaque relationships of causality and determination between (a) discursive practices, events and texts, and (b) wider social and cultural structures, relations and processes; to investigate how such practices, events and texts arise out of and are ideologically shaped by relations of power and struggles over power, and to explore how the opacity of these relationships between discourse and society is itself a factor securing power and hegemony . He suggests that the lineages between discourse, ideology and power may well be unclear to those involved, and more generally that our social practice is bound up with causes and effects which may not be at all apparent (Fairclough1993:135).

)

Approaches to discourse analysis differ widely, depending broadly on whether the research purpose is to meet descriptive or critical aims. Discourse analysis (DA) can be used for analysing social or individual discourses (Coupland and Coupland, 1995), or can be used to provide descriptive analysis of the text, in which the emphasis is placed on the wider context (Wodak, 1996). Descriptive studies explore the discursive processes of social construction, whereas critical studies focus explicitly on the reproduction of power relationships and how structures of inequality such as age, class, race and gender, are reproduced in discourse (Coupland and Coupland, 1995, Ainsworth, 2001). Discourse Analysis can be used for the study of individual phrases, wording, and larger texts, and can be applied to both conversation and written text, as indicated in the following quote:‘

It [DA] seeks to study the organisation of language above the sentence or above the clause, and therefore to study larger linguistic units, such as conversational exchanges or written texts. It follows that discourse analysis is also concerned with language use in social contexts, and in particular with interaction or dialogue between speakers’ (Slembrouck 2005:1).

Fairclough’s three-dimensional framework of analysis explores linkages in particular discursive events. Each discursive event has three dimensions or facets: it is a spoken or written language text, (for example reports of meetings), it is an instance of the discourse practice involving the production and interpretation of text (declarations and resolutions, for example); and it is a piece of social practice, (Plans of Action, for example.).

This thesis is concerned with the analysis of the linkages between the three dimensions, to build a picture of how each stage informs the next and hence builds power. In practice this approach is able to incorporate factors ranging from a macro social domain to more detailed factors such as genre, location, date, circumstance, participant role and affiliation (Huckin, 2002).

Critical discourse analysts are as mindful of the micro-level activity in discourse analysis as in the larger and perhaps more overt arenas of dominance. For example, ‘utterances contain patterns and cues, which communicate unconscious messages’ (Wuthnow et al., 1984:233), while use of certain words and phrases can obscure realities. The expressions ‘old’ and ‘elderly’, for example, evoke different images in different cultures, as indicated in section 2.1. The use of terms such as ‘household’ or ‘family’ can also obscure realities

in situations where a researcher has not sought to identify older people. They are commonly used terms in both gerontology and development, and yet they are often not defined in research situations where it would be useful to learn whether older people are included as part of that family or household (Arber and Ginn, 1991, FEG Consulting and Save the Children, 2008, Coast et al., 2008a). This opaqueness in the language may also serve to inhibit the translation of a global discourse into local practice. It is therefore essential to look beyond the presentation of words in the text to reveal whether there had been intended or unintended inclusion or exclusion of older people.

Traditional CDT is concerned with the spoken or written word. These are by definition present and available for analysis. However, as already noted, the development discourse is largely silent on the subject of older people. How then to systematically analyse a text in which there is no overt linguistic form? Huckin (2002) has identified five forms of ‘silence’ or ‘textual ellision’. These are speech–act silences, pre-suppositional silences, discreet silences, genre-based silences and manipulative silences. The cues for the first four types of silence tend to reflect socially learned behaviours, such as tact, diplomacy or silence in response to a rhetorical question, with discernible patterns and rules. Manipulative silences are distinct from all other types of silence because they ‘intentionally mislead or deceive the reader or listener in a way that is advantageous to the writer/speaker’ (Huckin, 2002:235). To identify and reach an understanding of any intended or unintended ‘deception’ and a possible motive requires a contextual analysis of the sociopolitical and historic circumstances in which the text lies (Huckin, 2002). This necessitates an analysis of the social situation and all relevant or possibly relevant factors to the participant (the older person in this case) to determine what *could* have been said but wasn’t (Huckin, 2002). Such textual silences must, in some sense, be relevant to the topic and the surrounding context; otherwise, virtually anything unsaid would count as a ‘textual silence’ in virtually any text. In particular cases, the actual context consists of those features that are relevant to the topic at hand for the participants involved; based on their personal experience and social knowledge (Huckin, 2002:253).

This is a valuable addition for examining documents without named authors, which is common among national and international civil servants and comprises the substance of the discourse analysis for this thesis. The use of ergative structures, such as the ‘treaty was written’ rather than ‘Smith’s department wrote the treaty’, creates a silence of responsibility and removes agency from the actor or actors, thereby allowing it to appear as if things just happen (Widdowson, 2004). Consideration needs to be given to both the process of what is happening, such as ‘populations are ageing’, as well as the result that ‘populations have aged’.

Meaningful communication at any level requires an understanding of language in context – understanding does not exist in a vacuum. A distinction has been made between ‘communicative’ uses of language – aimed at producing understanding – and ‘strategic’ uses – oriented to success and making people do things’ (Mayr, 2008:5). The latter is often seen as a practice used by institutions in order to influence individual and collective policy and action, and hence is bound up with power.

The functioning of a discourse has important consequences for power relationships within a society. A study of discourse thus also involves an examination of power exercised through the discourse. In other words, discourse analysis involves an investigation of the experts that produce and maintain the assumptions and core ‘truths’ of the discourse (Ebrahim A., 2004:4).

The approach in this research is concerned with the discourse of institutions and social power, and how these impact on older people collectively (van Dijk, 1996, Mayr, 2008). Clarity in what is being sought is important for identifying changing circumstances, new priorities, developing policy and practice results. For example, if evaluators are not minded to find out about older people, they are unlikely to find information about them. ‘We are faced in large measure’, to quote Narman and Simon (1999), ‘with a situation in which what is not said might very well be more important than what is said’ (1999b:5). In this case the absence is as much about discussing their activity as ‘experts’ as it is about the circumstance and status of older people. Yet the pursuance of development theory and practice is dominated by those who have been socially sanctioned to determine what is right or wrong because of their positions as external powerbrokers and potential holders of funds and it is these very experts, as indicated earlier, who appear to be consistently failing to notice older persons (Chambers, 2006). Economic hierarchy in

modern society, i.e. the resources an individual or grouping is able to command, presents another tier of hierarchy between the ‘in’ and the ‘out’ groups (van Dijk, 1996). It could be argued that older people in developing countries with few resources at their command find themselves low down in the hierarchy.

Studies by Alnoor Ebrahim (2004) of how development is both thought about and practiced, as well as written and talked of, moves the discussion from theory into practice.

[A]ssumptions are reflected in text, conversation and in actual development projects and standard operating procedures. They are also reflected in development policies at national and international levels. As such, one can differentiate development discourse in terms of development thought, development practice, and development policy (Ebrahim A., 2004:4).

This is pertinent for this study as it seeks to explore not just how the discourse is maintained but the impact it has on grassroots practice in development. Chambers (1997), for example, discusses how powerful institutions, such as the World Bank and the International Monetary Fund, express and form ‘the mindsets and values of dominant linguistic groups, disciplines and professions, and organisations’ (Chambers, 1997:1746). He suggests that development experts:

...are programmed by their education and experience to examine what shows up in a bright but slender beam which blinds them to what lies outside it. Knowing what they want to know, and short of time to find it out, professionals in rural areas become even more narrowly single-minded. They do their own thing and only their own thing. They look for and find what fits their ideas. There is neither inclination nor time for the open-ended question or for other ways of perceiving people, events and things (ibid).

Ebrahim’s (2004) study of the relationship between NGOs and international funders demonstrated the impact of this on NGOs and how they are obliged to adopt the language and rules of the IGOs in order to carry out their programmes. The essential question is how the patterns of discourse expressed in the written form are the result of perceived structures which have the power to influence or limit individual choice or how much they are the result of agency. ‘Whilst retaining a concern with the dynamics of power and knowledge, embedded within and (re)produced by social policy, a Foucauldian approach shifts attention away from a sole analysis of the state...to [an] understanding of the

institutional and social practices' (Powell and Biggs, 2003:2). Powell and Biggs argue that discourse analysis is a useful methodology for looking at 'taken-for granted' assumptions about ageing, exploring perspectives on the individual older person, such as views of the ageing body, to approaches on macro issues of medical and social power in relating to older people. The responsibility for control and decision-making is thus seen as reaching beyond stated power and becomes part of the everyday practice of all those engaged in a given field of activity.

Fairclough (1992) built on Foucault's discursive theory and developed what he has named critical discourse analysis (CDA).

[L]anguage is not just a transparent medium for reflecting the way things are. On the contrary, language constructs the world ... in one way or another according to position or perspective – we can evaluate different constructions in terms of their adequacy, but there is no getting away from their positioned nature (Fairclough, 2000:23).

By bringing together various traditional practices, including detailed linguistic analysis, the interpretative micro-sociological tradition in sociology and the macro-sociological analysis of social practices from Foucault, Fairclough has created a three dimensional approach to analysing discourse: (i) how the text is, (ii) how it is produced, distributed and consumed; and (iii) how the connections between the text and the social practices relate to the social structures (Fairclough, 1993a). Fairclough presents an approach which lies between linguistics, with its focus on word usage, and Foucault, whose interest is with the wider domain of language use without consideration of detailed texts. Critical within Fairclough's approach is the concept of intertextuality, i.e. a discourse is always related to a previous or simultaneous discourse, or as Fairclough states: 'every text is constituted by elements of other texts' (Fairclough, 1993b:102). International institutions with world-wide membership present additional challenges for the development of an institutional discourse as texts in such institutions are rarely written by an individual (Wodak and Meyer, 2001). For example, as an inter-governmental body the UN, must create a 'language' or discourse able to present the interests of its 193 members, who are

frequently not working in their ‘mother tongue’ and whose hundreds of languages are translated into the six languages of the UN.¹⁴

In summary the application of critical discourse theory to this research will contribute to understanding how power relationships can be influenced and maintained by the type of language used. A qualitative content analysis of a range of selected documents will assist in exposing how older people are represented in key policy narratives in development. It will identify how different interests are presented and promoted by ‘silence’ and the style, type and use of language in the development discourse.

The following chapter provides an illustration of how a discourse can change over time, seeking to bridge the gap between theory and practice, by examining the changing representation of women in development.

¹⁴ The six UN languages are Arabic, Chinese, English, French, Russian and Spanish

Chapter 4 Moving from the margins: women and development

How can we respond ethically to difference? What is the value of a human life? Who decides these questions, and what do the answers reveal? (Burch and Sutherland, 2006:1).

4.1 Introduction

The introduction to this thesis drew attention to the history of women in international development discourse and practice as an exemplar for examining the position of older people in development. This chapter illustrates how women and gender have become incorporated into the development agenda; it identifies the main patterns in the discourse and indicates conceptual differences, parallels and corollary implications with the discourse on older people, ageing and development. As the research, debate and literature on gender and development is vast and growing my treatment of it here cannot be comprehensive. Instead I select key documents and indicative trends for comparative purposes and to illustrate key learning points relevant for older people and development.

The chapter is structured in six parts. Following this introduction Section 4.2 examines how women have been represented historically or have represented themselves in the development discourse when their interests have been the focus of attention. Section 4.3 looks at how women's representation has changed in the wider development discourse by looking at 'non-gender-specific' documents during the period.¹⁵ Section 4.4 looks specifically at how the interests of older women have been addressed in the gender and development discourse. Areas of confluence and dissonance in the debates on gender and development, and on ageing and development are explored in Section 4.5. A brief closing summary is presented in section 4.6.

4.2 The story of women and development

The story of women in international development has witnessed a series of shifts in political understandings and alignment of women within development: from feminisation

¹⁵ Further illustrations are provided in Chapter 7

to engenderment, from women-centred activities to mainstreaming, and from pursuance of separate agendas to association with other global movements (McIlwaine and Datta, 2003). There were several developments that made a substantial impact in promoting the rights and responsibilities of women globally in the public and private spheres.

According to the literature the points of influence in the 'gender and development calendar' are the 1975, 1980, 1985 and 1995 World Conferences on Women and the production of the Convention of the Eradication of Discrimination Against Women (CEDAW)¹⁶ in 1979 (Moser, 1993, Kabeer, 1994, Mkandawire, 2004, Harcourt, 2006, Cornwall et al., 2007). In addition the period saw several international summits on critical aspects of development as part of an UN-led drive to establish an integrated global agenda for development. These provided a positive environment for furthering women's advocacy.

The First International Women's Conference, held 1975 in Mexico presented a radical agenda calling for the achievement of equality between men and women, that would include a reassessment of the family and community roles of both sexes (Kabeer, 1994). The follow up recommendations added weight to these aspirations by declaring 1976-1985 the United Nations Decade for Women: Equality, Development and Peace. It sought to promote 'full integration of women in economic, political, social and cultural development' (UN, 1985: para 37). By 1980, the reporting and implementation mechanisms established for the Decade had been diffused throughout the UN regional commissions; and specialist agencies established to provide funding, research and training dedicated to promoting women's human rights, political participation and economic security and providing direct support for women's projects.¹⁷ The 1980 mid-decade World Conference of Women organised in Copenhagen produced a plan of action

¹⁶ CEDAW contains a section called 'general recommendations' which it enables it to incorporate new themes and issues of concern. To date these have included violence against women, HIV/AIDS, disabled women and most recently older women

¹⁷ These included the United Nations Fund for Women (UNIFEM) established 1976 by the General Assembly to provide funding for women's projects; and the International Research and Training Institute for the Advancement of Women (INSTRAW) established 1975 by the GA to carry out research, training and information activities worldwide to promote women as key agents for sustainable development.

that focused on employment, health and education for women. By the end of the Women's Decade, which culminated in the 3rd Women's Conference in Nairobi, the Decade was deemed to have been more successful in promoting and discussing the issues than in providing practical on the ground change for women (UN, 1985). The 'Forward-looking Strategies for the Advancement of Women to the year 2000', which emerged from the Nairobi conference sought to provide a blueprint for women's advancement. Its 372 paragraphs dealt with the complete spectrum of women's role in society, with the key aspirations encompassed within the following paragraph:

What is now needed is the political will to promote development in such a way that the strategy for the advancement of women seeks first and foremost to alter the current unequal conditions and structures that continue to define women as secondary persons and give women's issues a low priority. Development should now move to another plane in which women's pivotal role in society is recognised and given its true value (UN, 1985: para 21).

The Strategy indicated an important shift in the discourse on women and development moving the debate from Women in Development (WID) to Gender and Development (GAD). The thrust of WID had been to influence the development community to move away from the perception of women's roles in development being concerned with reproduction, maternal care and agricultural support, to expand their economic potential alongside that of men. 'WID advocacy shifted the grounds for investing development resources in women from *welfare* to *efficiency* (Kabeer, 1994: 25, author's italics)'. Dominated by the economic hegemony of development WID was regarded though as failing to address women's agency as contributors to the wider aspects of development such as human rights and human development. GAD sought to shift the ground from the economic hegemony inherent in the WID model to an agenda that transformed the status of women in relation to men in development by recognising them as individuals whose own ends are important and should be attended to, and enhancing their ability to participate in development through enhancing their capabilities, by capacity building and empowerment training (Kabeer, 1994, Nussbaum, 2000). With pressure from women's groups, the conferences and summits of the 1990s further raised awareness around the world and placed gender equality issues at the centre of international discourse on policy-making related to environment, population, reproductive health, human rights, food

security, social development and human settlements (Molyneux, 1998, McIlwaine and Datta, 2003).

Commenting on the progress of women and development in the period from the 1970s to 1995 Harcourt (2006) noted that the reformist approaches that sought to adapt existing practices and attitudes towards women were failing to address the ideology and structural underpinnings that were maintaining the position of women:

The gender and development discourse, as it emerged from the 1990s UN conferences and gender and development programmes and research that surrounded them, essentially continued to create a colonized poor and marginalized woman who needed to be managed, educated, trained for work and local decision making, and controlled reproductively and secularly through a multiple series of development processes designed for 'women's empowerment' (Harcourt, 2006:15).

A means for confronting the power balance between men and women necessitated a new formulation for examining the socio-political environment and a way of working together (Kabeer, 1994). The 'Platform for Action' from the 1995 Fourth World Conference in Beijing included commitments to achieve gender equality and the empowerment of women. The full participation of women: 'on the basis of equality in all spheres of society', were seen as 'fundamental for the achievement of equality, development and peace' (UN, 1995a:Beijing Declaration, para 13). Mainstreaming' became the new paradigm and accepted strategy for improving the situation of women following the Beijing Conference. In the words of the Beijing Platform for Action, mainstreaming was to be:

'a process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas and at all levels. It is a strategy of making women's as well as men's concerns and experiences an integral dimension of the design, implantation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so women and men benefit equally and inequality is not perpetuated (UN, 1995dpara 124 (g)).

Its goal was to bring gender into all aspects of organisational and project-level policy and practice. The premise was that consideration of women as well as men should be integral to development policy and to political, economic and social structures, rather than the previous focus on improving the situation of women in isolation (Thomas, 2005).

Numerous gender analysis frameworks evolved to assist in analysing the role of women in development, seeking to achieve equity for men and women, rather than equality (Moser, 1993, Kabeer, 1994, March et al., 1999). Gender *equity* takes into consideration the differences in women's and men's lives and recognises that different approaches may be needed to produce outcomes that are equitable. Gender *equality* on the other hand is based on the premise that women and men should be treated in the same way. The frameworks have ranged from positioning women in economically productive terms, as the instruments for the ends of others, and as the objects of an analysis, to recognising women's substantive role in development and enabling them to be the subjects of analysis (Nussbaum, 2000). Three such frameworks dominated the agenda in the 1980s and 1990s (i) The Harvard Analytical Framework, (ii) The Moser Gender Planning Framework, and (iii) The Social Relations Approach (SAR)¹⁸ (March et al., 1999). As these approaches resonate with how older people could be appraised in development, the frameworks are briefly reviewed below.

The Harvard Analytical Framework, known also as the Gender Roles Framework, was an early approach in systemising attention to both women and men and their different positions in society. It is based upon the position that allocating resources to women as well as men in development efforts makes economic sense and will make development itself more efficient – a position labelled as the “efficiency approach” (March et al., 1999). The main aim is to make visible men and women's work by collecting data on their respective productive and reproductive (household) activities and assessing the level of control they have over resources. The Moser Gender Planning Framework introduces the idea of women's having ‘three roles’: ‘reproduction’, covering their domestic role, childbirth and childrearing; ‘production’, covering work for cash or in kind; and ‘community management’, covering their contribution to the use and maintenance of community resources (Moser, 1993). The framework discusses the implications these roles have for women's participation in the development process. In making these links, both between women and the community, and between gender planning and development planning more broadly, Moser's framework encompasses both practical and strategic

¹⁸ Social Relations Approach – the standard acronym is SAR, in contrast to the expected ‘SRA’

aspects of gender integration into development, acknowledging that women's economic circumstances and position in society must change simultaneously. Finally, the SAR model starts from the premise that development is a process for increasing human well-being (survival, security and autonomy), and is not only about economic growth or increased productivity. As development is mediated and influenced by many institutions, their relationships with gender need to be examined to identify underlying, and/or structural factors that are acting as obstacles to women's advancement (Kabeer, 1994). Cornwall et al (2007) have criticised all these models for being top down and for not engaging participants in describing their own experiences. Other models, such as the gender analysis matrix (Parker, 1993) and Hlupekile's (1995)¹⁹ gender empowerment models, present approaches that assist in self-defining issues and solutions that develop the capacity of women to become their own agents of change (Standing, 2007).

In sum this historical sketch has shown how the trajectory of the discourse on women and development has moved from one in which women have been seen as ancillary to one in which they are individuals whose own lives are important and are to be attended to (Nussbaum, 2000, Fraser and Honneth, 2003).

4.3 Evidence of the changing discourse on women and development

Gender is now firmly embedded in the development discourse (Cornwall et al., 2007). Extensive evidence of this can be found in documentation from many IGOs and INGOs, for example DFID and Oxfam have both produced guidance manuals on how to integrate gender into the mainstream of their work, the annual reports of many NGOs include women or gender in their mission statements (see selected annual reports in Appendix 2), the HDI includes gender in many of its categories, as well as having a separate Gender Equality Index, and the MDGs contain a dedicated goal promoting gender equality and empowerment. This section presents some additional evidence from a critical discourse analysis carried out for this thesis on a small sample of the texts used for the CDA later

¹⁹ The Women's Empowerment Framework was developed by Sara Hlupekile, a gender expert from Lusaka, Zambia. The Framework consists of five stages: welfare, access, conscientisation, mobilisation and control

on in this thesis for older people (see Chapters 6 and 7). The CDA comprises a contextual analysis of a number of UN texts. The aim is to demonstrate changes in the representation of women at key points in the development calendar during the period 1970 to 2007. The process for selection of documents is discussed fully in Section 6.2 of this thesis. Briefly, two genres of UN documents were selected for this analysis. These were the texts incorporating the statements for the opening of each UN Development Decade, the point at which the UN presents its main priorities and interests for the forthcoming decade; and the reports of a sample of landmark events in the development calendar of the IGOs and INGOs; in order to examine some critical moments in the progress of development from 1982 to 2007 (Pitanguy, 2002). The selection is consistent with the texts discussed in Chapters 6 and 7. The selected events and dates are summarised in Table 4. An extensive word frequency of texts from the World Bank, UNDP and the OHCHR comparing the number of references to women, older people and children is described in Chapters 6 and 7. The full results of these can be found in Appendix 4.

Table 4 Documents identified for CDA on Women and Development

Year	Event
1961	Opening of 1 st Development Decade
1970	Opening of 2 nd Development Decade
1974	World Summit on Population (UNFPA)
1980	Opening of 3 rd Development Decade
1986	Declaration on the Right to Development
1990	Opening of 4 th Development Decade
1995	Summit on World Development
2000	Millennium Declaration
2005	World Summit Outcome

The acknowledged association between poverty and marginalisation of categories of people in development (Green, 2002) provides the legitimacy for selecting the key anti-poverty and social development conferences of the 1990s and 2000s for analysis. The

Copenhagen Summit on World Development in 1995 confronted the growing concerns of the 1980s and 1990s about the lack of progress in reducing world poverty, with the need for social development, rather than economic growth, to be the goal of international development (Streeten, 2001). This in turn laid the foundations for the current dominant driver in international development: the Millennium Development Goals (MDGs). Agreed at the General Assembly of the UN in 2000, world leaders adopted the Millennium Declaration aimed at eradicating extreme poverty and hunger, through a set of goals and measurable targets (the MDGs) to be achieved by the year 2015 (UN, 2000). A follow-up conference five years later produced the World Summit Outcome which reiterated the commitment to the MDGs. The results of the analysis are discussed more fully in the CDA on ageing in Chapter 7. A further word frequency analysis comparing the number of references to women, children and older people in texts from landmark and specific agencies, can also be found in Section 7.3.

The focus of the First UN Development Decade 1961 was primarily on non-human resource management and economic growth (UN, 1961) and contained no specific references to women or gender. Ten years later the Second UN Development Decade contained the following single brief mention:

The full integration of women in the total development effort should be encouraged (UN, 1970²⁰).

Although there was no indication of what this sentence might mean in practice, it indicated, to quote Kabeer (1994:1), the ‘first glimmerings of consciousness’ by the UN at large that women should have a place in development. The areas of interest about women in development were concerned with population control and food production, thus addressing their ‘reproductivity’ and their ‘productivity’, rather than their role in the wider development issues. For example, at the 1974 UNFPA Bucharest conference, the rationale for reducing high rates of fertility in developing countries was grounded in economic growth rather than women’s rights or health. The 1974 World Population Plan of Action referred only once to women in their own right.

²⁰ UN (1970) International Development Strategy for the Second United Nations Development Decade. Section B: Goals & Objectives, para 18 (b)

The 3rd UN Development Decade²¹ demonstrated a growing concern with social conditions and the wellbeing of different populations, containing several references to women and gender. It reaffirmed the recommendations of the 1980 UN Decade, notably to eliminate the structural imbalances that perpetuated discrimination against women.

Full and effective participation by the entire population at all stages of the development process should be ensured. In line with the Programme of Action adopted by the World Conference of the United Nations Decade for Women, women should play an active role in that process (UN, 1980: para 51: Goals and Objectives).

There were also indications of a greater awareness to improving equity as well as increasing equality between men and women. Measures were to be taken to enable women greater access to food, employment, training, education, health and for men to play a role in the family (UN, 1980). The reference to men in this statement is also an indicator of trying to change the perception of only women as carers, suggesting a move towards greater equity between men and women in both the domestic and public spheres.

The 1986 Right to Development reiterated this approach:

Effective measures should be undertaken to ensure that women have an active role in the development process. Appropriate economic and social reforms should be carried out with a view to eradicating all social injustices (UN, 1986: Article 8).

The 4th UN Development Decade²² resolution contained little about women and their role in development. It drew attention to the particular vulnerabilities of women and children to poverty, and stressed the need for special attention to maternal and child health care and nutrition (UN, 1990: para 83). The section on Human Development - covering education and training - referred to women in the context of inter-related functions of all aspects of human development and human rights (ibid: para 94) stating again that 'special attention' should be given. The representation of women as both vulnerable and in need of special attention to improve their status reflects an ongoing conundrum of how both to represent and respond to the different interests of a heterogeneous section of the population at different stages in their lives.

²¹ Third UN Development Decade (1981-1990) ([A/RES/35/56](#), 5 December 1980)

²² Fourth UN Development Decade (1991-2000) ([A/RES/45/199](#), 21 December 1990)

The evolution and use of the gender framework tools, outlined in 4.2, demonstrated their impact on the changing perception of women by policymakers and its corollary impact in the development discourse. The background to the 1995 Copenhagen World Summit on Social Development Declaration states:

that social and economic development cannot be secured in a sustainable way without the full participation of women and that equality and equity between women and men is a priority for the international community and as such must be at the centre of economic and social development (UN, 1995d: Declaration para 7).

The Summit highlights the forthcoming Beijing Conference and is already familiar with references to equity as well as equality, in respect of family responsibilities, access to education, training, health care, and in the context of human rights and legislative frameworks. Commitment 5 in of the Plan is dedicated to the interests of women:

We commit ourselves to promoting full respect for human dignity and to achieving equality and equity between women and men (UN, 1995d).

The MDGs and pro-poor agenda of the 2000s reinforced the representation of women in the global development discourse. The underlying principles and values of the Millennium Declaration state that:

No individual and no nation must be denied the opportunity to benefit from development. The equal rights and opportunities of women and men must be assured (UN, 2000: para 6).

Women are identified as critical to the elimination of poverty and the world is invited:

To promote gender equality and the empowerment of women as effective ways to combat poverty, hunger and disease and to stimulate development that is truly sustainable (UN, 2000: Part III Development & Poverty Eradication, para 20).

Goal 3 of the eight MDGs is dedicated to promoting gender equality and empowering women, with targets that seek to improve the proportion of girls in education, the share of women in paid employment and the proportion of seats held by women in national parliament (see Appendix 1). Gender has continued to be part of the mainstream discourse in international development. For example, the 2005 World Summit Outcome, (the follow up to the 1995 Copenhagen Social Development Summit) undertook to: regard gender as a main ‘horizontal policy theme’, along with sustainable development

and human rights ‘that should be taken into account in decision making throughout the United Nations’ (UN, 2005: para 169). There is a continuing commitment to mainstreaming a gender perspective as a practical means for ensuring women’s interests are integrated into ‘policies and programmes in all political, economic and social spheres, and further’ (UN, 2005: para 59).

An evident discursive shift, indicated by the sample of UN documents reviewed above, can be seen in the ways in which the role of women is discussed. In the early years the focus had been on population control and the role of women in food production in LDCs (FAO, 2003). By the 2000s, women were being seen as part of the wider development movement designed to empower individuals and communities (Vavrus, 2002).

Notwithstanding criticism of the different development models practised over the last thirty years, indicated earlier in this Chapter and in Chapter 1, all the key approaches, including empowerment, participation, human rights and rights-based approaches (RBAs), now actively seek to incorporate dimensions and awareness of gender equity (Mama, 2007, Rai, 2007, Tsikata, 2007).

Many contest whether the substantive changes in the discourse have been followed through to practice (Moser and Moser, 2005, Reid, 2005, Cornwall et al., 2007). Much has been written on the subject. It is beyond the scope of this study to explore this in detail but it is pertinent to present a few examples of the expressed concerns as part of the examination of older people and development. Feminists argue that the original aim of ‘the gender debate’, of transforming the lives of women in development as individuals and in relation to men, has become diluted or obscured in the ‘technologisation’ of discourse. They are critical of applying schematic changes that do not deal with real change (Kabeer, 1994, Reid, 2005, Cornwall et al., 2007). Mainstreaming which was viewed as a key pathway to change following the 1995 Beijing Conference, is regarded by many as neither working nor improving the status of women (Reid, 2005, Cornwall et al., 2007). Rai (2007) finds that although formal indicators suggest positive activity, for example the fact that most countries have signed up to CEDAW, she does not find much change on the ground in terms of, such factors as improved education take-up by girls

and young women, or increased formal political engagement by women. The formulae of change are deployed, such as organisation evaluation tools, but without acknowledging the different contexts in which they are being used or how they need to be adapted to these contexts (Fairclough, 1996, Lazar, 2005, Cornwall et al., 2007). Rai (2007) questions whether the existing machinery is capable of effecting change, arguing the need for resources to democratise systems. As alternative actions for change, Rai (2007) suggests that a strengthening is necessary in the relationships between the governance of politics and the governance of communities, different groups, cultures, practices, sexualities and women. The increasing participation, consultation and empowerment approaches promoted by INGOs and IGOs for converting discourse to practice have been successful in drawing women into local debate but are nonetheless not perceived to be unravelling the real poverty of a life lived as a secondary citizen (Francis, 2001). Women's participation has been built into the inception, design and delivery of programmes throughout LDCs but, as Clair et al (2003) note, authentic participation only works if programme makers and practitioners actively reach out to make visible those who are normally invisible.

The human rights approach can be a helpful tool in the discourse for supporting the changing condition of life for women, in recognising each person's right to shelter, food, life (Fraser, 2000, Nussbaum, 2000). However, a human rights approach does not recognise difference between individuals and groups in terms of their position in society and hence maybe an inappropriate tool for changing the strategic position of women in society. Unterhalter et al (2008) highlight the difficulties in putting gender equality policy into practice in highly unequal societies. Their case study of gender and education take-up in Kenya and South Africa, as an example of how the MDGs are working in practice, indicated that both strategic and practical factors are getting in the way of progress. At the strategic level they identified gaps between the ways in which gender inequalities are normalised in culture or everyday practice, such as withdrawing girls from school before boys, and the 'broader transformatory gender equality aspirations articulated in the documents to which both governments are signatories like CEDAW and the Beijing Declaration', (Unterhalter et al., 2008:25). Additionally they noted that the

global process of policy making is disconnected from the practices of teachers, school committees and managers who come to know only fragments of policy. On a practical level they found that formal links between institutions inhibited a dynamic exchange of ideas on controversial and sensitive subjects, such as gender or poverty, and that at an individual level, teachers have different perceptions of what their responsibility and role is for progress. They suggest that so many competing interests and demands make it difficult to act on national and global poverty and gender equality issues in anything but the most minimal form (Unterhalter et al., 2008).

4.4 Older women in the gender and development discourse

Since the mid-1980s there has been a steady flow of resolutions from the General Assembly and the Commission on the Status of Women (CSW) directly referencing the role of older women in development: Several examples are given below to illustrate the scope of interest, ranging from a life-course to human rights approach, from health care provision to promoting older women's individual capabilities so they can be who they wish to be (Nussbaum, 2000). There has however been a noticeable absence of follow-up on these resolutions in the women and development literature or by other UN bodies. Evidence of these gaps will be presented later on in this section.

The situation of older women came to some prominence in the women and development field at the International Women's Conference, Nairobi, 1985. The UN General Secretary cited previous conferences at which the interests of older women had been raised, and the ensuing strategy from the conference included a dedicated section on 'Elderly Women'. The 1985-2000 strategy noted the comments in the 1982 International Plan of Action on Ageing about the impact of life course factors, such as unemployability, low pay, repeated pregnancy and widowhood, on women's later economic position and state of health. It further proposed that as women age they 'should be enabled to cope in a creative way with new opportunities' (UN, 1985:para 286). Attention was to be given to studying and treating the health problems of ageing, particularly in older women, and stressed the need for long-term policies directed toward

providing social insurance for women in their own right (UN, 1985: para 286). Building on these proposals the CSW in 1992 adopted resolution 36/4, 'Integration of elderly women into development', noting in its introduction that:

.. elderly women, in all regions of the world, represent an important human resource, and that their contribution to society and development in the economic, cultural, political and social fields often remains unseen or unrecognized (UN, 1993: 36/4)

It commented on the need for nation states, IGOs and NGOs to gather and analyse information on 'present and future generations of elderly women' and requested that the planning groups for a series of forthcoming global summits (ICPD, 1994, World Summit on Social Development, 1995) should address the interests of older women. Reference is made to the impact of these in Chapter 7.

The Beijing Declaration and Platform for Action (1995) presented an inconsistent view of older women. The following paragraph seems to suggest that their only role would be as recipients of care by younger women:

According to United Nations projections, 72 per cent of the population over 60 years of age will be living in developing countries by the year 2025, and more than half of that population will be women. Care of children, the sick and the elderly is a responsibility that falls disproportionately on women, owing to lack of equality and the unbalanced distribution of remunerated and unremunerated work between women and men (UN, 1995a: Platform for Action para 30).

On similarly negative notes The Beijing Platform had excluded age from its general commitments to equalities; and the opening paragraphs of the Beijing Declaration, while naming many conferences, summits, declarations and interest groups as part of the global framework, made no reference to any of the earlier UN commitments to older people (UN, 1995a: Declaration para 10). By contrast, older women were specifically mentioned in the Beijing Platform for Action with regard to their poverty, health, and acts of violence against them. The Platform includes 'age' within its list of different characteristics of groups (ibid: para 46) and refers to the increased poverty experienced by women living into older age as a consequence of fewer opportunities for education, training and employment earlier on in their lives (ibid: para 52). It further encouraged research and disaggregated data in order to identify different needs and circumstances at

different stages of life (ibid: para 104). Nonetheless while acknowledging the impact of earlier life circumstances on their later years, the dominant perspective of older women in the Beijing Platform is primarily one that views older women as passive recipients of care and services, rather than as instrumental in contributing to change or development.

The UN adopted a more positive position in 1998. Its report to the CSW 'Older women and support systems: new challenges' acknowledged that caregiving patterns for older persons needed reviewing as economies and family structures changed, while also acknowledging the active and productive role of older women (UN, 1998). At its follow-up meeting to the Fourth World Conference on Women in 1999 approaches for addressing the situation of older women had started to become part of the wider programme for improving equality between women and men. The following quote illustrates this development:

Although older women's contributions remain significant, many of them, in particular those who are poor and disadvantaged have remained invisible to the policy makers of the developed and developing countries. A study of 151 countries unequivocally rejected the idea of older persons as 'dependant retirees'. It negated the idea as a "myth" and concluded that many older persons continue to work and contribute to the nation's economy. Hence, approaching elderly women as a "development asset" reconceptualizes them as active contributors and highlights their value to polity, economy and society (UN-ECOSOC, 1999:para 36).

The ICPD+5 meeting held that same year agreed that by 2005 countries should have developed gender-sensitive strategies for meeting the basic needs of older people. It recommended that countries should:

Invest more resources in gender-sensitive research as well as in training and capacity building in social policies and health care for the elderly, especially the older poor, in particular older women; support affordable, accessible and appropriate health-care services; (UNFPA, 2002:13).

While the UN statements advancing the position of older women in society have become stronger, other UN bodies concerned with social development, other IGOs and the feminist literature on development have demonstrated little interest in the position or role of older women in the gender and development discourse (Sen, 2000). Interestingly

feminists in development appear to deploy similar lines of arguments against the inclusion of older women in development, to those that were used in earlier times against the inclusion of women in development. In contrast to how studies discuss the strength afforded to women through collective activity and social networks there is little reference to how *older* women could work together at the local level. Feminist networking at international conferences that allowed local women's rights activists to access and exchange ideas and strategies across national boundaries did not extend to including older women's interests (Garcia and Parker, 2006, Goetz and Sandler, 2007). The gender efficiency and productive models and frameworks offered by Moser, Harvard and others did not recognise the situation of older women. The emphasis on economic return of the models indeed mirrors the accepted model of older people as being non-providers in the home and without a role in the public sphere.

4.5 Comparing the discourse on gender and development with older people and development

There is substantial common ground between the two fields of Gender and Development and Ageing and Development from which insights may be drawn about the parallel marginalisation of women and older people (Vera-Sanso and Sweetman, 2009). These include similarities in the types of attitudes to both groups, which have rendered both groups invisible, as victims and as having secondary value in development (Bytheway, 1995, Andrews, 1999, Nussbaum, 2000). Both groups have been subject to the affects of a development focus that marginalises those not deemed to be economically productive, and there are parallels in the rights debates across gender and ageing (UN, 1979 & 2010, UN, 2010).

As noted in Chapter 2 it is possible to see parallels between Kabeer's approach and the political economy of ageing, which similarly removes responsibility from the marginalised person in society to their locus in that society (Walker, 1981, Fraser, 2000, Phillipson, 2005). The gender and development theoretical frameworks described earlier have some parallels with debates in gerontology and contain lessons that could be

directly applicable to older people. The Harvard Model illustrates the possibilities of gathering data on the respective productive roles of different social groups; Moser's (1993) Gender Planning Framework points to the different roles that people play in society and Kabeer's (1994) SRA located gender in wider social structures, institutions and the state. Likewise parallels can be drawn with Fraser and Honneth's (2003) binary approach to gender and development, which argues that women have been 'sub-ordinated (sic) in the economic structure and the status order of society' (ibid:19). This division between economic (or 'conditional') and hierarchical ('positional') status could provide a helpful framework for examining the locus of older people in development. For example, older people's positional power in society is increasingly evident in the growing interest in intergenerational equity (Engelman and Johnson, 2007), while issues relating to an older person's economic situation in society have had a longer visibility in social policy as represented by the long history of social protection (Lloyd-Sherlock, 2004, Barrientos and Hulme, 2008). Debates on equality versus equity in the gender and development field likewise have relevance for older people. Receiving the same treatment as everyone else may not be helpful in enabling older people to fulfil their human capabilities or aspirations (Andrews, 1999, Nussbaum, 2000). Older people in LDCs may, for example, want to further their literacy skills by attending a local school. This offers them equality of opportunity with other students. But if the school is some distance away, requiring a lengthy walk that the older person is unable to manage, the offer of education is inequitable because the older person is unable to use the opportunity (Thomson and Goldsmith, 2004).

However, drawing parallels between the debates on ageing and gender presents some conceptual and practical difficulties. Foremost is that both men and women are affected by ageing and ageism – albeit that their experiences of it will be different and the outcomes will affect their lives differently. Second, as indicated in Section 2.2, the category of 'old' is variously defined. 'Older people' is less of a self-defined constituency: people seldom self-identify as 'old' and they regularly apply the term to someone else (Degnen, 2007). Third, gender is generally a fixed identity, limited by being male or female. By definition ageing is an ongoing process of change experienced

by everyone, though intertwined with other identities, including gender, race, class, disability and sexuality (Osaghae, 2009). Fourth, there is no clear delineation of 'young' and 'old', as there is of male and female (Cunningham, 2005). The discourse of difference however is commonly concerned with opposing social groups, such as male/female or black/white. In practical terms this makes it more straightforward to gather, analyse and make comparisons between which group is receiving fewer or greater levels of resources (Wodak, 1996). Such comparisons would be difficult to make between young and old. Equally, in contrast to gender equity (Lazar, 2005), intergenerational equity tends not to be about according an equal status to or equality between two groups, such as men and women, but is one that creates a relationship of fairness or justice between generations, with an expectation of reciprocity, and an understanding that the two groups support rather than harm each other (Brock, 2002, Hashimoto and Ikels, 2005, Engelman and Johnson, 2007). Like the term 'gender', 'intergenerational' is a relational concept, and thus while it affords an older person some status and 'value' in society it simultaneously denies them their right as 'stand-alone' individuals, who happen to be male, female, young or old (Fraser and Honneth, 2003).

There is nonetheless substantial knowledge from the progress of gender in development that can be brought to bear on furthering the role of older people in development. There is learning to be taken from both the WID and GAD approaches. WID demonstrated the need for promoting practical measures, such as access to credit and employment, as the means for integrating women better into the development process (Østergaard, 1992, Moser, 1993). While the GAD approach to improving the status of women, presents paths to changing the prevailing discourse by changing the status and position of power of older people, through integrating them into all aspects of society (Moser, 1993). Finally, progress in gender and development has drawn on a long history of campaigning activity. The success of campaigning social movements of the 1960s and 1970s on race and class in the global north, and disaffection in the global south with the new economic order contributed to the emergence of a global women's movement (Streeten, 1981, Kabeer, 1994). Feminist networking at international conferences allowed local women's rights activists to access and exchange ideas and strategies across national boundaries.

Engaging in and learning from studies could assist older people develop a constituency in LDCs (Phillipson, 2003).

4.6 Concluding comments

Women were represented in the originating documents that set the background for international development. Since then studies on 'Third World' women have grown continuously with scientific papers, books, world-conferences, descriptive accounts of empirical work, policy documents and methodological developments, such as disaggregation of data (Østergaard, 1992). Studies of gender and development emerged in the 1970s with the UN Decade of Women and the first UN International Year on Women of 1975. Prior to the 1970s it was estimated that less than one per cent of standard text books on development referred specifically to women (Kabeer, 1994:xi). Today the literature on gender and development is extensive and there are sizeable programmes throughout the world from both government and non-government agencies which focus on women and gender. Virtually all development agencies now include a gender-based perspective in their programmes, and for some, such as USAID, such a perspective is mandatory (Moser and Moser, 2005, Rai, 2007). Increased attention has improved the status of women in development policy, changing analytical tools has contributed and disaggregation of data has made it possible to assess women's contribution. However, there is an absence of similar data for older people. Although the rhetoric is impressive and there has been distinct progress for women the many reflexive studies illustrating the failures of progress for women do not bode well for older people (Lazar, 2005, Cornwall et al., 2007, Goetz and Sandler, 2007, Rai, 2007, Mukhopadhyay, 2007). An aim of feminists in development has been to transform the image, role and reality of the lives of women, and not to make their interests an adjunct to the social structure. Mainstreaming, for all its difficulties, has helped change some day-to-day practices but it has been shown not to be enough (Reid, 2005, Cornwall et al., 2007, Standing, 2007). The level of success of changing gender relationships has 'depended on the strength and power of the women's movement' (Pitanguy, 2002:805), building transnational alliances between women of the south and north, a theoretical base

built on extensive research and changing macro-political arrangements at the national and international levels (Pitanguy, 2002, McIlwaine and Datta, 2003). The perseverance of feminist campaigns has brought women to the surface and aided the visible increase in their role and status. The women's movement has developed over many decades – it has organised and mobilised in ways that are not yet evident among older people.

Summary of Part II

Part II has shown the subtle and complex ways in which a discourse can maintain and promote taken-for-granted assumptions about particular social groupings. How different perspectives are presented in a discourse affects the manner in which a group is regarded and treated (Wodak and Meyer, 2001). The first part of this section examined the construction of a discourse and how using CDA as a research tool can contribute to a deeper understanding of the position and status of a marginalised group in society. Examining the progress of women in development, in the second part of this section, has provided an example against which the discourse on ageing and development can be compared in the remainder of the thesis. It has demonstrated a continuing need for reflection and debate to sustain progress in promoting the interests of a marginalised group. It has further highlighted how wider contextual debates relating to the goals of social development, social relations and equity, enabled effective change to occur (Kabeer, 1994, Molyneux, 1998, Fraser and Honneth, 2003, McIlwaine and Datta, 2003). The shift in the discourse from women in development to gender and development reflected a shift in the balance of power and responsibility for effecting change from women to the population as a whole.

Enlarging the apertures for understanding does not however automatically lead to positive change. The motivations for social categorisation differ for different people: some, for example, may want their distinctiveness taken into account, or they may want to be unburdened of it (Fraser and Honneth, 2003). According to Fraser and Honneth (2003) marginalisation has the capacity to both subjugate and strengthen the position of the marginalised. Exposure by identity, such as age, race or sexuality, can reinforce

difference, resulting in further subjugation, and preventing the already marginalised group from moving outside fixed boundaries (Foucault, 1989, Wodak, 1996). It can potentially place the responsibility for change on the marginalised group and away from the mainstream, where the power to effect changes rest. On the other hand raising the profile of the marginalised group can increase their access to specialist resources. The conception of where power lies in the formation of marginalisation has been fundamental to understanding the theoretical and discursive shifts in the progress of the role of women in development. This is a perspective that could be explored in relation to older people's positioning in international development.

The next part of the thesis applies a critical theory approach, using an age lens, to the development discourse by examining the roles and activities of significant agents in international development policy and practice. Chapter 5 provides an overview of the role of the agencies and attends to the relationship between the global discourse of which they are part and local development practice. Chapters 6 to 9 examine, through examples, how older people and ageing are represented. The comparison with women/gender will be developed further by studying examples of how women are represented in development. The study will build on the limited research currently available on literature in ageing and development. It will contribute to existing knowledge in the field by exploring the impact of the international development discourse on the implementation of development policymaking and programming for older people.

PART III Research: Discourse Analysis

A substantial part of international development is concerned with the deployment of external interventions aimed at improving the circumstances of the poor and ‘empowering’ people to direct that improvement. The mainstays of these interventions are the international government bodies – the United Nations funds and agencies and the Bretton Woods organisations (notably the World Bank and the International Monetary Fund); the bi-lateral government donor agreements and the International non-government organisations (INGOs), such as Action Aid, Oxfam and Danida.

Part III thus explores whether and how the development discourse relating to older people has found expression in the thinking and practice of such development institutions (Ebrahim A., 2004). It provides an overview of the main activities of and potential for the UN’s engagement in promoting and supporting the interests of older people and a detailed analysis of a sample of key texts in the UN calendar from 1982 to 2007 relating to social development. The section consists of three chapters. Chapter 5 presents an overview of the role played by the main international development agencies in LDCs, setting out the early steps in this research for bridging the gap between discourse and practice. It starts by locating critical points in the history of the UN that contributed to the status of older people relative to other groups in global development. It then moves to examining the allocation of resources to ageing programmes relative to other groups, and summarises key programming accountability measures, again to indicate where and how the interests of older people in the dominant methods of measuring successful development.

The technocratic mechanisms of inter-government activity, such as conventions, treaties and declarations can be viewed as bringing legitimacy and visibility to certain issues and exercising a “moral” effect on national governments’ (Pintaguy, 2002:816). Chapters 6 and 7 thus explore in detail how older people have been represented in key social policy narratives in development by undertaking a critical discourse analysis on selected texts

from significant UN Summits and Declarations and UN bodies concerned with human and social development. The review will pay attention to how women have been represented in these documents in order to generate an analysis of when, where and why representations of women do and do not include older women, especially in the context of the changing representation of women as a result of WID/GAD.

Chapter 6 presents the methodology for the selection of the texts and the tools deployed in the analysis. Chapters 7 present the findings. A timeline (see Figure 3) of the period under review, 1982 – 2007, immediately follows this introduction. This offers a visual presentation of the main events in the global development, ageing and gender calendars within the context of major global events during the 25 year period. This has assisted in identifying some of those key points for analysis. Part III closes with a summary overview of the findings.

Figure 3: Timeline indicating correspondence of events between ageing and development at international level

(acronyms are spelt out on the last page of the timeline)

Age	Year	Intergovernmental ¹ Development (UN, World Bank)	Women/ ^{2, 3} Children	Major Regional & World events
UN 1 st World Assembly on ageing (Vienna) International Plan of Action on Ageing 62 recommendations for Action agreed. Voluntary code, no mandate	1982			Third World Debt Crisis
	1983			
	1984			AIDS virus discovered
	1985	SAPs consolidated	3 rd World Conf on Women (Nairobi)	
	1986	UN GA Resolution on Development as a Human Right		
	1987	Brundtland Report (sustainability)		Stock market crash
	1988			
	1989		Convention on the Rights of the Child adopted	Berlin Wall brought down. Tiananmen Sq protests

¹ Decade dominated by World Bank/IMF Structural Adjustment Programmes² International Decade of Women³ The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) 1979 in place

Age	Year	Intergovernmental Development (UN, World Bank)	Women/ Children	Major Regional & World events
	1990	1 st Human Development Report		1 st Iraq war
UN Principles for Older Persons adopted by GA	1991	Harare Commonwealth Declaration on Human Rights	1 st session of Ctte on Rights of the Child	Fall of USSR
Proclamation on Ageing: 16h October GA agreed to hold International Year of Older Persons	1992	UN Declaration on Environment & Development (Rio)		Balkan War
	1993	World Conference on Human Rights (Vienna)		
World Bank <i>Old Averting the Age Crisis: Policies to Protect the Old and Promote Growth</i>	1994	International Conference on Population & Development WDR focus on market driven economies		Rwandan Wars
		UN International Year of the Family		
The Economic, Social and Cultural Rights of Older Persons (Dec 8)	1995	World Summit for Social Devpt (Copenhagen)	4 th World Conf on Women (Beijing)	WTO set up

Age	Year	Intergovernmental Development (UN, World Bank)	Women/ Children	Major Regional & World events
	1996	UN Conference on Human Settlements (Habitat II), Istanbul		
	1997	WDR: <i>The State in a Changing World</i> HDR: <i>Human Development to Eradicate Poverty</i>		Global Economic Crisis Fall of Tiger economies
- UN International Plan of Action on ageing & UN principles for older persons - “Towards a Society for All Ages” UN worldwide theme adopted. Decision made to hold 2 nd WAA	1998			
International Year of Older People	1999	PRSPs introduced		- Riots at Seattle WTO - Argentina economic crash
	2000	Millennium Development Goals (MDGs)		-EU Directive prohibiting age discrimination - GW Bush elected President - World Social Forum inaugurated
	2001	Least Dev Countries Decade declared (Brussels)		- 9/11 -West invades Afghanistan

Age	Year	Intergovernmental Development (UN, World Bank)	Women/ Children	Major Regional & World events
2 nd WAA (Madrid) MIPAA	2002	The Brandt Equation: 21 st century blueprint for new global economy		
		UN Conference on Financing Development (Monterrey)		
	2003			2 nd Iraq War
	2004			GCAP set up Asian Tsunami
	2005	MDGs: 5 year update		NEPAD estd
1 st International Elder Abuse Awareness Day	2006			
	2007	WDR: <i>Development & the Next Generation</i> HDR: <i>Fighting Climate Change</i>	UN Convention on Rights of Persons with Disabilities adopted	

Acronyms

GA = General Assembly

GCAP = Global Campaign Against Poverty

HDR = Human Development Report

WAA = World Assembly on Ageing

WDR = World Development Report

NEPAD = The New Partnership for Africa's Development

PRSPs = Poverty Reduction Strategy Programme

SAPS = Structural Adjustment Programme

Chapter 5 The engagement of international development agencies with older people

Chapter 5 describes the main features of the international development agencies and how these have a bearing on issues concerned with older people. It also starts to identify linkages between the development discourse and practice, as mediated by those agencies. Global perspectives help situate local action through influencing it by both its presence and its absence (Giffen and Judge, 2010). Several studies examining the linkages between global discourse and local practice have highlighted a range of factors that affect the smooth two-way flow between global discourse and practice.

In order to set the current global context relating to older people, the chapter starts with a brief background on the history of the UN's expressed engagement with population ageing. The milestones in the UN's progress on ageing from the period 1982 – 2007 are illustrated in Figure 3. The chapter moves on to review the resources available to, and roles played by, the different UN funds and agencies and the World Bank in relation to older people. It examines the accountability measures established to monitor and evaluate development programmes, which are viewed as essential in measuring the success of development interventions. The last section of the chapter presents a synopsis of the part played by the international NGO sector and the bi-lateral donor agreements between LDCs and developed countries.

5.1 Older People on the UN Agenda: background

In order to provide a larger canvas for viewing where older people have been situated in international development, it is useful to recall three key points in the history of the United Nations: i) the adoption of the Universal Declaration on Human Rights in 1948, ii) the launch of the first 'development decade' in 1961 and iii) the Declaration on the Right to Development in 1986.

The first date of note is 1948, with the adoption of the Universal Declaration on Human Rights (UDHR):

Everyone is entitled to all the rights and freedoms set forth in this Declaration, without distinction of any kind, such as race, colour, sex; language, religion, political or other opinion, national or social origin, property, birth or other status (United Nations, 1948: Article 2 UDHR).

Neither age nor older people were mentioned, though ‘other status’ allowed for additional dimensions of discrimination to be taken on board as they emerged. Over the next sixty years Conventions on the Status of Refugees (1951), the Elimination of All Forms of Discrimination against Women (1979), the Rights of the Child (1989), Protection of the Rights of Migrant Workers and Members of their Families (1990) and most recently the Convention for Disabled Persons (2007) have come into being. A defence for the continued non-introduction of a convention on older people was that all were included in the 1948 UDHR, (MIPAA, 2002). However, as noted in the introduction to this thesis, the development of separate covenants to protect the rights of particular groups, such as women, children, migrants, disabled persons is a manifestation that the UDHR is not able to adequately cover the interests of different population groups (Fraser and Honneth, 2003, Megret, in press 2011). Megret (2011) further argues that the creation of separate conventions is not only functional, providing additional oversight of named groups, but is also qualitative, indicating that significant differences exist in the treatment of rights of various groups.

The principal international human rights instruments also did not contain any provision for older people (Lipman, 2005a, Megret, in press 2011). Neither the International Covenant on Civil and Political Rights (ICCPR)²³, nor the International Covenant on Economic, Social and Cultural Rights (ICESCR)²⁴, both adopted in 1966, mentioned older persons. However Article 9 of the ICESCR stated everyone had a right to social security, including social insurance. This could be interpreted to include recognition of a

²³ The ICCPR commits its parties to respect the civil and political rights of individuals, including the right to life, freedom of religion, freedom of speech, freedom of assembly, electoral rights and rights to due process and a fair trial.

²⁴ The ICESCR commits its parties to work towards the granting of economic, social and cultural rights, to individuals, including labour rights and the right health, to education, to an adequate standard of living and to take part in cultural life

right to older-age benefits. In 1995 the ICESRC issued General Comment No 6 on the rights of older persons which noted that member states did not ‘provide any information in a systematic way on the situation of older persons with regard to compliance with the Covenant’ (UN, 1995b:para 14). To remedy this, the ICESRC provided a framework on how the Covenant should be applied to older persons, noting that it apply to men and women and that ‘State parties should pay particular attention to older women who ...are often in critical situations (UN, 1995b:para 20). The General Comment follows the format of the ICESCR, providing guidance on how each of its Articles could further the interests of older people. It suggests for example, under Article 9 on social security that:

States parties should, within the limits of available resources, provide non-contributory old-age benefits and other assistance for all older persons, who, when reaching the age prescribed in national legislation....have no other source of income (UN, 1995b:para 30).

and:

Article 13, paragraph 1, of the Covenant recognises the right of everyone to education. In the case of the elderly, this right must be approached from two different and complementary points of view: (a) the right of elderly persons to benefit from educational programmes; and (b) making the know-how and experience of elderly persons available to younger generations (ibid: para 36).

These two examples illustrate the potential range of support for and activity by older people: from ensuring a basic standard of living through the provision of social security, to learning from and building on the experience of older people. The civil and political rights of older persons have yet to be attended to (Lipman, 2005).

The second major contextual point was the launch in 1961 of the First United Nations Development Decade. This marked a major world-wide endeavour to give concrete substance to the pledge of the UN Charter to ‘ensure a minimum standard of living consistent with human dignity through economic and social progress and development’ (United Nations, 1970:A(1), March et al., 1999). Each decade since has brought with it a new and different focus that has underpinned development objectives for that decade. The 1970s saw the advancement of women; sustainable development was the focus in the 1980s; human rights in the 1990s and anti-poverty, environmental sustainability and good governance in the decade from 2000 (Hunt, 2004). The international development

strategy for the Fourth Decade, agreed at the 1990 UN General Assembly, was the first to draw attention to older people, stating ‘there should be programmes to integrate the elderly’ (United Nations, 1990a: para 94).

The third critical contextual point for consideration is the 1986 UN Declaration on the Right to Development (RtD). The concept for the RtD had emerged in the 1950s and 1960s in recognition of the structural disadvantages faced by the new countries emerging from colonialism. It expressed a dual purpose of promoting the right of all nations and peoples to economic and human development and of furthering this by taking a human rights approach (Sengupta, 1999, Kirchmeier, 2006)²⁵. The RtD Declaration expressed the aim of development as being:

‘[A] constant improvement of the well-being (sic) of the entire population and of all individuals on the basis of their active, free and meaningful participation in development and in the fair distribution of benefits resulting there from (UN, 1986:para 2).

The obligations contained in the Declaration invoke the responsibility of the international community as a whole, the nation state and the individual. Though the collective approach to human rights can be viewed as inconsistent with the generally accepted concept of human rights, which rests on the understanding that individuals have rights in relation to society and the state (Steiner and Alston, 2000), a human rights approach to development is very much the currency of a diverse range of actors working in development, from UN bodies to local grassroots NGOs (Gready and Ensor, 2005, Tsikata, 2007). The RtD Declaration is not a legally binding instrument but references to it are now found in all major UN documents, including the Millennium Declaration, which states: ‘we are committed to make the right to development a reality of everyone’ (UN, 2000: para 11). While the understanding and implementation of a rights-based approach by different agencies varies, from providing a framework for programming, to the achievement of rights becoming an end in itself, the acknowledged value has been the attempt to afford all parties, from international funding bodies to local groups, rights and responsibilities within the development relationship (Gready and Ensor, 2005:7).

²⁵ Professor Arjun Sengupta (India) served as an independent expert on the Right to Development from 1999 to 2004.

These three key markers in the UN's journey of addressing development give some insight into the political and economic arena in which the voices of older people compete to be heard. The above indicates that the interests of older people have been by-passed at the very heart of the UN.

5.1.1 The arrival of ageing on the UN agenda

The first World Assembly on Ageing, held in Vienna in 1982, signified the formal opening of interest in older people at the global level (Treas and Logue, 1986). Introduced initially onto the agenda of the UN General Assembly in 1971 as the 'Question of the elderly and the aged', it was the 1978 meeting of the General Assembly that agreed to convene a World Assembly to launch an international programme on ageing. A Plan of Action comprising 62 recommendations emerged from that Assembly. This is examined in detail in Chapter 7. The Plan aimed to strengthen the capacities of Governments and civil society to deal effectively with the ageing of populations and to address the developmental potential and dependency needs of older persons. It distinguished between two main streams of activity: 'humanitarian' issues, such as basic living needs, health, social welfare and family relationships; and developmental issues, which related to the socio-economic implications of the ageing of the population (Treas and Logue, 1986). The focus was on the developed countries, where the age structure was already changing rapidly. Less attention was given to the LDCs where elderly populations were still a small proportion of the overall population. They were however advised 'to recognise and take into account their demographic trends and changes in the structure of their populations in order to optimise their development' (IAPP, 1982: B).

Nine years later, in 1991, the UN General Assembly adopted the United Nations Principles for Older Persons. These 18 Principles fall into five clusters relating to the status of older persons: independence, participation, care, self-fulfilment and dignity. In 1992 in commemoration of the tenth anniversary of the adoption of the Vienna International Plan of Action, the UN General Assembly adopted the Proclamation on Ageing to promote and disseminate both the Vienna Plan and the Principles. The Proclamation acknowledged the growing numbers of older people in developing

countries and afforded nearly as many points of action and responsibility to the international agencies as it did to individual national initiatives. (UN, 1992:e).

In its resolution 50/141 of 1995 the UN further invited:

[R]elevant research institutes to consider preparing studies on the four facets of the conceptual framework, namely, the situation of older persons, lifelong individual development, multigenerational relationships and the relationship between the ageing of populations and development' (UN, 1995c: pt. 10).

It also proclaimed the year 1999 the International Year of Older Persons (IYOP). The conceptual framework for the IYOP was likewise based on the Vienna Plan and the 1991 Principles. Aiming to build on other global initiatives, (including the 1995 ICESRC General Comment No 6 referred to above), it adopted the theme 'a society for all ages' from the 1995 World Summit for Social Development, in which the highest priority was given to the 'social development and human well-being for all ...' (UN, 1995d : para 12). International bodies, financial institutions and UN agencies were invited by the UN to consider their respective roles in relation to older persons and how they would meet the challenges of a growing older population. From the documents examined many of the organisations indicated they were planning to undertake specific pieces of research in relation to older people (UN IYOP, 1999). During IYOP the UN's designated lead body on ageing, based in the Department for Economic and Social Affairs (DESA) in New York, proposed strengthening the 1982 Plan on Ageing, through establishing new targets. Additional resources were thus added to the UN's Ageing Programme for the realisation of a summit to be held in Madrid in 2002.

The Second World Assembly on Ageing held in Spain produced the Madrid Plan of Action on Ageing (UN, 2002)²⁶. Further targets were set, but the resources and budget were reduced to pre-summit levels (Sidorenko, 2008).²⁷ In contrast to the 1982 Plan, the 2002 Plan of Action is primarily developmental and places considerable focus on the LDCs and countries in transition, such as the former Soviet Union and the Eastern European bloc. Early discussions had considered drawing up several plans to reflect the different world regions, but ultimately a single plan was produced that focused on

²⁶ The complete text of MIPAA can be found at <http://www.un.org/esa/socdev/ageing/secondworld02.html>

²⁷ Personal communication 13 March 2008 at UN, New York. Alexandre Sidorenko was the former Focal Point on Ageing, Department of Economic and Social Affairs at the UN.

universally applicable features, such as poverty, shelter, participation and accessibility. Each year since 1982 an update on ageing has been given to the annual meeting of the General Assembly (GA) and since 2002 the GA has included a specific agenda item for follow-up on the World Assembly on Ageing on which it passes resolutions. An in-depth content analysis of the 1982 and 2002 Plans is presented in Chapter 7.

5.1.2 UN resource allocation to older people

Resourcing for the ageing programmes has taken two forms: (i) directly through a financial allocation to support the Focal Point on Ageing, the strategic and administrative function to promote ‘ageing’, based at the UN in New York, and (ii) indirectly, through the work of the UN’s agencies and funds. Additionally there is a Trust Fund for Ageing available for the Focal Point to make small grants to further the ageing programmes of individual nations.

(i) Direct support for ageing and older people programmes

The level of resource allocation for the ageing programme is small in absolute and relative terms. Table 5 shows in monetary terms the scale of operation of the main general and specialist agencies in the UN. As can be seen there are no separate funds or agencies for older people, while there is a very longstanding and substantial organisation for children and an agency for women. In contrast with agencies such as UNDP and UNICEF, the UN’s Programme on Ageing comprises four full time paid staff (Sidorenko, 2008) and resides in a department within a division (Division of Social Policy and Development), in DESA, which is a part of the UN Secretariat. It is one of a number of special programmes that includes disability, cooperatives, family, youth, employment, poverty eradication and the NGO unit.²⁸ It does not have its own agency within the UN structure, such as UNICEF or the recently created UN Women²⁹ and is hence unable to raise independent funds.

²⁸ Source: UN DESA: Division for Social Policy and Development. Accessed from website 29 January 2008

²⁹ UN Women, created in July 2010, is the new voice of women in the UN. It brings together and will build on the work of four previously distinct parts of the UN system, including UNIFEM.

Table 5 Who gets what in the UN

a) Sample of UN Programmes and Funds

	Year Started	Number of Staff	Budget \$bn, 2007	Main purpose
UNICEF	1946	7,200	3.1	Assistance to children and mothers in developing countries
UNHCR	1950	6,300	1.0	Protection of refugees
WFP	1963	10,600	3.0**	Provide food for emergency needs and economic development
UNCTAD	1964	450	0.1	Integration of developing countries into the world economy
UNDP	1965	5,300	4.8	Help countries in their economic development
UNFPA	1969	1030	0.7	Supports countries to use population data for policies and programmes to reduce poverty
UNEP	1972	890	0.2	Promote care of the environment
UNIFEM	1976	n/a*	0.1	Promotion and inclusion of women
UN-Habitat	1978	n/a	1.53	Promote socially and environmentally sustainable towns and cities

* Figures unavailable but has 15 regional offices & 16 national committees worldwide ** 2005 Figures

b) Relevant specialised agencies

	Year Started	Number of Staff	Budget \$bn, 2007	Main purpose
ILO	1919	1,900	0.5	Promote rights at work and employment opportunities
UNESCO	1942	2,100	0.7	Promote education, science & culture as contribution to peace & security
World Bank	1944	10,000	26.8	Technical advice, loans, credits and grants for poverty reduction and improvement of living standards
IMF	1944	2,500	0.9	Monitor countries' economic and financial development, loans for balance-of-payment difficulties
FAO	1945	3,600	0.8	Achieve food security for all worldwide
WHO	1948	8,000	1.6	Provide leadership on global health matters
UNIDO	1966	650	0.2	Promote growth in small and medium enterprises
IFAD	1976	430	0.1	Combat rural hunger and poverty in LDCs

Source: adapted from The Economist.com. 'Who runs the world? Wrestling for influence' July 3 2008

The current primary function of the UN Focal Point on Ageing is to facilitate and promote the Madrid Plan of Action. It seeks to maximise the use of its resources by providing guidance (through seminars and the written word), to encourage others to incorporate the interests of ageing and older people into their national, regional and international programmes. Each of the main UN agencies has a named focal point, whose role is to promote ageing within their agency but for whom the task has been attached to other roles. Additionally, there are national focal points on ageing, which are often single-person offices responsible for developing, implementing and monitoring national policy on ageing, including the implementation of the Madrid Plan of Action (United Nations, 2006).

The Trust Fund for Ageing exists to award small grants to enable countries to develop and support programmes for older people. It was established by GA resolution 35/129 of 11 December 1980, ‘for preparatory and follow-up activities of the World Assembly on Aging... and to encourage further interest in the field of aging among developing countries’ (UN, 1982 para 6). An initial amount of \$1,000,000 (US) was made available in 1982. Made up of contributions from the UN and member nations this sum had fallen to \$304,000 (US) by 2009 (UN, 2010).³⁰ GA resolutions regularly note that member nations have not maintained their contributions to the Trust Fund. At each annual meeting of the UN, individual members and the associated bodies of the UN resolve to do more and member states are invited to contribute to the Trust Fund for Ageing.

(ii) Indirect support for ageing and older people

The UN agencies hold responsibility for their own programmes, funding and priority-setting. They seek to debate these with country members at significant world summits, international conferences and seminars, bringing together UN agencies, governments and global players to highlight policy, practice and monitoring of targeted initiatives. Resolutions and communiqués are released, plans of action produced for adoption and implementation by all, and organisational resources possibly allocated to stimulate a

³⁰ A/65/5 (Vol. I) 10-46808 141 United Nations general trust funds Schedule 7.1. Schedule of income and expenditure and changes in reserves and fund balances for the biennium ended 31 December

global initiative. For each programme, the respective agency produces monitoring and evaluation schema that reflect the priorities and culture of that agency.

The 1990s saw an unprecedented level of activity from the UN in terms of global conferences on social development.³¹ These included the 1990 World Summit for Children in New York, the 1992 Conference on Environment and Development in Rio de Janeiro, the 1993 World Conference on Human Rights in Vienna, the 1994 UNFPA Population and Development Conference (ICPD) in Cairo; the 1995 World Social Summit in Copenhagen; the 1995 Fourth World Conference on Women in Beijing; and the 1996 Human Settlements Conference ('Habitat') in Istanbul. Each of these generated follow-up conferences and UN General Assembly Special Sessions. The 1994 ICPD was the only one to specifically address the interests of ageing. UNFPA aims to promote the right of every woman, man and child to enjoy a life of health and equal opportunity'. The substantial concerns of the UNFPA conference and subsequent plan of action were, however, on population ageing rather than on older people where concerns were expressed about the implications of changing birth rates and improved child health, with considerably less attention given to the consequences of these programmes for the older end of the age spectrum (UNFPA, 1994).

UN activity opened the 21st century with the Millennium Summit of 2000 which, building on the Copenhagen World Summit on Development, established a new agenda against poverty. All the UN agencies noted in the above paragraph are involved in and have plans for reducing poverty – long-held goals reinforced by the MDGs. Eight goals, 21 targets and 60 progress indicators were set. The full set of targets is listed in Appendix 1. Four new targets were added in 2007³². An impressive array of monitoring and tracking procedures are in place, all of which are publicly available for viewing on the MDG Monitor website (UNDP, 2008)³³.

³¹ The bodies reviewed included UNESCO, UNDP, UNFPA, WHO, World Food Programme, UNEP, ILO and UN-Habitat.

³² See: mdgs.un.org/unsd/mdg/Host.aspx?Content=Indicators/About.htm Sourced 4-6-09

³³ The MDG Monitor showcases existing UN data. The figures presented are from the official MDG Indicators database, maintained by the UN Statistics Division

Box 1 The Millennium Development Goals**Millennium Development Goals**

1. Eradicate extreme poverty and hunger
2. Achieve universal primary education
3. Promote gender equality and empower women
4. Reduce child mortality
5. Improve maternal health
6. Combat HIV/AIDS, malaria, and other diseases
7. Ensure environmental sustainability
8. Develop a global partnership for development'

Source: UNFPA report of panel discussion at Tours 2005:5

Five of the eight goals are concerned with gender, mothers and children, relating to equalities, health and education (Box 1). The health goals exclude consideration of chronic illness. The remaining three, concerned with poverty, sustainability and global partnerships in development, are all directly relevant to older people, but there is no reference to older people as providing an indicator of success in the achievement of the MDGs. Despite the annual General Assembly resolutions on ageing, the UNFPA programme, and the anticipated 2002 World Summit on Ageing, a search of the publicly available preparatory papers concerned with the development of the MDGs and the Millennium Declaration did not reveal a single reference to older people.

The UN agencies offering the greatest recognition of older people have traditionally been WHO, ILO and the Regional UN bodies. WHO's early focus was primarily on health, as expressed through its Ageing and Health Programme. Launched in 1995 it incorporated 'a lifecourse perspective focused on 'ageing' rather than compartmentalising the healthcare of the 'elderly'' (Kalache et al., 2005:40). This was later extended to create the global programme on 'active ageing', launched as the 'Ageing and the Life Course' at the 2002 World Summit on Ageing. Active ageing is defined by WHO, as 'the process of optimising opportunities for health, participation and security in order to enhance quality of life as people age' (ibid). Active ageing policies apply to population groups and individuals (Kalache et al., 2005). In 2006 WHO developed the Age-friendly Cities

Programme, to help cities prepare for the rapid ageing of populations and increasing urbanisation. The Programme targets environmental, social and economic issues, such as outdoor spaces, transportation, social inclusion, that influence the health and well-being of older adults (WHO, 2006). The interests of the ILO are, like WHO, framed by the life-course approach (Boulin et al., 2006). In respect of older people they are primarily concerned with barriers to the employment of older workers and social protection to ensure an adequate income in old age. At the meeting of the Commission for Social Development in February 2007, the representative from the ILO highlighted the particular difficulties facing vulnerable social groups in attaining work (UN-CSD, 2007:Annex 2 para 2). He argued that maximising decent work and work opportunities for all ages and physical abilities would help reduce poverty, increase economic and personal security, increase efficiency, improve equity and strengthen social integration within families and societies. The UN's five regional commissions, concerned about the impact of ageing populations for regional social and economic development, have also started paying increasing attention to these issues. Since 2008 the regions for Europe (UNECE), Latin America and the Caribbean (ECLAC) and South Asia and the Pacific (ESCAP) have specific ageing strategies. ECLAC has taken this further and at its meeting in Brasilia in December 2007 agreed to propose to the UN the appointment of a rapporteur to monitor and protect the human rights of older persons (ECLAC UN, 2007). Discussions furthering a human rights convention for older people are ongoing (Zelenev, 2008a, Megret, in press 2011).

The 2002 World Summit on Ageing yielded some activity from a few of the specialised UN agencies. Despite some references to 'older people' being seen as vulnerable, the position demonstrated by the UN-Habitat's Plan of Action was overall very positive, as indicated in the following quotation:

Older persons are entitled to lead fulfilling and productive lives and should have opportunities for full participation in their communities and society, and in all decision making regarding their wellbeing, especially their shelter needs...Special attention should be given to meeting the evolving housing and mobility needs in order to enable them to continue to lead rewarding lives in their communities, (UN-Habitat, 2003: para 17).

Unusually for a UN body, older people were identified in the UN-Habitat training guidance as one of the list of groups whom development workers should consider in their work.

All the UN agencies noted above are involved in and have plans for reducing poverty – long-held goals, which have been reinforced by the MDGs. No references to older people are recorded in the available notes of any of these meetings. The UNCHR's Right to Development has consistently failed to mention older people in its papers (UN, 1986, Commission on Human Rights, 2007) and UNDP, the agency with the largest budget for working with communities in LDCs, equally makes no mention of older people in any of its reports (UNDP, 2007b).

UNFPA's annual report for 2007 stated that it had 'strengthened its involvement in issues relating to older persons in compliance with the fifth-year review of the Madrid Plan of Action. It had organised two meetings for international experts and country-level participants to promote greater understanding of ageing and had jointly launched, with WHO, the 'Women, Ageing and Health: A Framework for Action' report. UNFPA had also supported research, analysis and policy dialogue in India, Jordan and Senegal (UNFPA, 2007:17). The FAO produced a series of papers concerned with the impact of population growth on rural development demonstrating that rural ageing is occurring faster than urban ageing (Skeldon, 1999, Stloukal, 2004 and 2001) but missed an opportunity to highlight the needs of older people when it determined to prioritise 'such marginalised groups as women, youth, persons with disabilities, indigenous peoples and herders' (ECOSOC 12 Feb 2007). Cross-sectional programmes concerned with financing and improvements in distributing aid have also omitted mention of support to or recognition of older people, even though women and children, among other groups, have been singled out for particular attention. The series of meetings on financing and aid effectiveness from Monterrey 2002, Rome 2003, and Paris 2005 through to the 2008 meeting in Accra all missed an opportunity to address ageing issues.

Some of the agencies have taken an intergenerational perspective in which interest crosses different age groups, most notably the ILO with its impact on the labour force and the WHO with its life-course approach on health (Stein and Moritz, 1999). In these situations the balance of interest appears to favour the younger generations. For example, the home page for the WHO website shows a picture of a young mother and child, below which WHO states:

Chronic diseases, such as heart disease, stroke, cancer, chronic respiratory diseases and diabetes, are by far the leading cause of mortality in the world, representing 60% of all deaths. Out of the 35 million people who died from chronic disease in 2005, half were under 70.³⁴

That means the other 50 per cent were over 70 years of age. Portraying a young girl in circumstances where older persons have a dominant interest has the potential to distort reality (Mayr, 2008), and in this instance to diminish the interests of the older population in favour of the young.

5.2 The relationship of the World Bank to older people

Poverty reduction through an inclusive and sustainable globalisation remains the overarching goal of our work' (World Bank, 2009).³⁵

The mission of the World Bank has evolved from a facilitator of post-World War II reconstruction and development to its present-day mandate of worldwide poverty alleviation, as indicated in the above quote. From 1968 to 1980, the bank concentrated on meeting the basic needs of people in the developing world and loans expanded from infrastructure into social services, such as improving literacy, agricultural reform, health and education. The structural adjustment policies (SAPs), introduced at the start of the 1980s (see Section 1.2), which were at the expense of health and social services, were also a large part of World Bank policy during this period. In recognition that economic development was being slowed down by structural adjustment loans, the World Bank and the IMF introduced the Poverty Reduction Strategy Paper (PRSP) approach in 1999 allowing for social spending to be maintained. The PRSP approach has been interpreted as an extension of structural adjustment policies as it continued to reinforce and

³⁴ Source: <http://www.who.int/chp/en/> WHO website accessed 14 January 2009

³⁵ Source: <http://web.worldbank.org/> Accessed 14 January 2009

legitimise global inequities.

There have been few references to older people in the World Bank's annual World Development Reports, since the first issue in 1978, mirroring the absence of older people in the evolution of development practice. Even in the years focusing on poverty in which sections such as 'Delivering Social Services to the Poor' (WDR, 1990) were substantial, there was no attention paid to older people. More detail on this is presented in Section 7.4. The many references to the poor did not distinguish between the needs of different population groups. Such lack of differentiation can work against identifying and meeting the interests of particular groups, including older people (Green, 2002). The World Bank's ground-breaking report 'Averting the Old Age Crisis' (World Bank, 1994) did bring older people, albeit briefly, to the top of the global economic agenda. The study identified three functions of old age financial security systems: redistribution, savings and insurance (ibid). Its focus was on the broad topic of income in old age. There was no focus on particular regions of the world. A feature of the report was its absence of reciprocity between ageing and development, in which older people could be seen as contributors to development. Older people were seen only as a potential drain on an economy.

In line with the growing pressure on rights-based approaches in development, the Social Policy Programme of the World Bank held a Conference in 2005 to explore wider concepts of social policy that would suit a developing country context. The conference, held in Arusha, Tanzania, brought together policy makers, academics and development practitioners from all regions of the world. Three 'new frontiers' of social policy were identified. The first of these aimed to promote:

the transformation of subjects and beneficiaries into citizens. This implies policies that recognise and promote the universal rights and responsibilities of citizens, and strengthen the capacity of citizens to claim their rights (Arusha Statement, 2005).³⁶

The purpose of quoting the above statement is to note the discursive shift from 'beneficiaries' to citizens, which appeared to indicate a change in the status of individuals

³⁶ Arusha, Tanzania, hosted the World Bank conference, 'New Frontiers of Social Policy', 12–15 December 2005. [access:http://go.worldbank.org/GVLVLLV790](http://go.worldbank.org/GVLVLLV790)

from dependents to equals. 'Citizens' also suggests all persons in a society, and thus includes older people. Hence, it could be argued that the World Bank moved its perception of older people from being a burden, as implied in *Averting the Old Age Crisis*, to one of their having equality with other population groups. In 2007 the World Bank noted that it worked 'with government, communities, civil society, and the private sector to help foster a state that is accessible, responsive and accountable to citizens' (World Bank, 2007³⁷). Yet the World Bank websites do not indicate an interest in older people as citizens. Its web pages do however highlight children and youth, girls, gender, women, child labour, disability, early childhood, indigenous peoples and migrants as key topic areas and themes on which it is working. This absence is an anomaly in the life-course approach adopted by the World Bank. The World Bank has stated that it has an interest in each stage of human experience and development as people age, and fails to mention those who are reaching the end of the life-course.

The World Bank report for 2008 added to the weight of argument in favour of policies to support older people. They identified three sets of circumstances that leave older people particularly vulnerable: loss of family support primarily through rural-urban migration and high incidence of HIV/AIDS; low level and declining social welfare support, and lack of opportunity or inability to find paid employment or access to credit (Holzmann and Hinz, 2008).

5.3 Accountability indicators

The accountability procedures of donors reflect the prevailing development paradigms. Assessment has moved from its earlier focus on only measuring economic benefit to a community to include social or cultural dimensions (Naidoo, 2009). These in turn become translated into practical schema, designed by a donor for use by its beneficiaries. The Logical Framework Approach (LFA) is one such tool, commonly used by development agencies, that clearly stipulates the type of information it needs for its own

³⁷<http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTSOCIALDEVELOPMENT/0>

purposes. The tool has been criticised for being mechanistic, reductive, costly and time-consuming for organisations working in the South ((Jones et al., 2012). Different data collection instruments for evaluating the effectiveness of programmes likewise reflect the commitment and accountability of the assessing body (Kusek and Rist, 2004). Four well-known surveys already in use are being drawn upon by countries to collect, monitor and report country data on multidimensional poverty for the MDGs: the World Bank Living Standards and Measurement Survey (LSMS), the Core Welfare Indicators Questionnaire (CWIQ), created jointly by the World Bank, UNDP and UNICEF; the United States Agency for International Development (USAID) Demographic and Health Survey (DHS); and the UNICEF Multiple Indicator Cluster Survey (MICS). All these indicators draw out women and child health and reproductive patterns and health in some form. ‘The Manual for Planning and Implementing the Living Standards Measurement Study Survey’³⁸ twice mentions old age pensions but none draws out broader quality of life indicators of relevance to older people, as they do for women, or has indicators relating directly to older people.

Poverty and Social Impact Analysis (PSIA) and Poverty Impact Assessment (PIA) are recently developed tool kits for analysing the distributional impacts of policies, programmes and projects on the wellbeing of the population, with particular focus on the poor and vulnerable (Stuart, 2007). They have emerged from global debate concerned with improving the quality of assessment of programmes and reforms prior to funding, and are publicly supported by the World Bank and the IMF. The tools have been acknowledged as having the capacity for addressing both social and economic concerns (Ehrenpreis, 2008:7). They are thorough in the questions posed, as indicated in the working example from Senegal (see Box 2). Yet there is no mention of the impact on older people, whose lives would be considerably affected by the proposed scheme as local costs rise and younger family members move away.

³⁸ Living Standards Measurement Study Working Paper No. 126 World Bank. 312 pages (1996) The manual explains the planning process, technical procedures, and standards used in LSMS household surveys, including what these procedures entail

Box 2 Whose blind spot? An example of Poverty Impact Assessment in practice

‘The subject of the PIA in Senegal was the Damnation Industrial Platform, a prestigious investment project of the Government of Senegal, which aimed to attract funds from the US Millennium Challenge Corporation (MCC). It involved all stakeholders, critically the workforce and the families that would be affected by the new development. What share of new income will go to poor families, that is the bottom half of the country’s households? How many migrants will come from rural areas to look for work? Will they be able to participate in the new economic activity? Will they leave their families? Will women find work and what type of work? Will land prices rise in the longer run? How are neighbouring communities going to cope?’

Source: [Ebrahim Diaz and Kerstin Meyer](#) *Thinking things through: Senegal’s First PIA*, in Ehrenpreis, 2008: 24

In commenting on the role that the IMF and World Bank should play in developing adequate assessment tools a consortium of INGOs, led by Oxfam, likewise made no mention of older people or ageing populations, though issues relating to women and gender are noted (Stuart, 2007:2).

Codes of good practice in the delivery of development programmes by government and non-government organisations provide another dimension for assessing how global practice is addressing the interests of older people (Pereira, 2002, Naidoo, 2009). The UNDP produces the highly acclaimed annual Human Development Reports (HDRs) and instituted the person-centred measure of human development, the HDI, as an alternative, or at least an addition, to the traditionally used economic measures. As the lead body chairing the United Nations Evaluation Group (UNEG), UNDP has a role in ensuring that all groups are included in evaluation processes. In the ‘Competencies and Ethics’ section of their guidance for evaluators of UN programmes UNEG highlights the need to be aware of a range of social issues (see Box 3).

Box 3 Standards for evaluation in the UN system - competencies and ethics

‘Evaluators should be aware of differences in culture, local customs, religious beliefs and practices, personal interaction and gender roles, disability, age and ethnicity, and be mindful of the potential implications of these differences when planning, carrying out and reporting on evaluations.’ (UNEG, 2005:7-8)

While age is included here there is no evidence to suggest that it is either about or includes older people. It may be intending to capture all generations or it may be encouraging others to be mindful of children and young people, or indeed older workers. Given that a pattern exists of older people's exclusion, it is important in this context to be clear about the semantic use of the term 'age' (Weber, 1985).

5.4 INGOs and bi-laterals

INGOs and national governments are increasingly constrained by the political, economic institutional environment in global development and appear to be less able or inclined to act independently (DiMaggio and Powell, 1983, Narman and Simon, 1999b, Cleland, 2008). By the mid 1990s nearly 20 per cent of the bilateral aid budgets of the OECD countries had moved towards emphasising structural adjustment packages (Hunt, 2004). While the dominant development policy discourse is led by UN agencies it is argued that INGOs, though substantially influenced and structured by the development discourse, are capable of innovation and transformation over time and thus able to respond and adapt more readily to changing circumstances (Ebrahim, 2004:15). At the same time it is necessary to acknowledge that the motivations of INGOs are complex especially so when invited to engage in externally driven programmes by governments and inter-government bodies (Foley and Edwards, 1996, Naidoo, 2009). Increasingly multi-lateral and bi-lateral agencies are seeking to engage with civil society organisations to inform the priorities of the agencies (Giffen and Judge, 2010). The global professional bodies concerned with ageing, such as Global Action on Aging (GAA), The International Association of Gerontology and Geriatrics (IAGG) and the International Institute on Aging³⁹ provide commentary, advocacy and research which seek to influence global agendas in respect of older persons. Attention is drawn to the progress made by these bodies as being indispensable both for its own sake as well as providing a foundation for policy actions, but in practice the link between research and policy agendas has been mostly sporadic (UN ECOSOC, 2006).

³⁹ The International Institute on Aging, based in Malta, is an autonomous body under the auspices of the United Nations. It was established in 1987.

Yet, the absence of interest in older people shown by the global bodies is mirrored in the programmes of the INGOs (Narman and Simon, 1999a).⁴⁰ This is evident from the annual reports of a number of the more influential and well established UK and USA INGOs⁴¹ which were examined (see Appendix 2). Direct references to and visual images of older people were very scarce. This is in sharp contrast to other population groups in the community. Without exception, the MDGs, with their overall aim of reducing poverty, are the key drivers for the current programmes of the major government and non-government development agencies. The sector which has traditionally claimed its difference and its independence from the mainstream, and its ability to be both innovative and responsive to changing circumstances has also become constrained by global politics.

Each of the INGOs reviewed promoted human rights and RBAs: emphasising that all lives have equal value, protecting and improving the lives of marginalised groups, and addressing unequal power relationships. Each organisation also acknowledged the particular discrimination faced by women and expressed concerns about how ‘women and children suffer disproportionately from poverty’ (CARE USA, 2007:6). ActionAid International, who included the following statement in their 2006 Annual Report (Box 4), was the only INGO to refer to older people in its annual report.

Box 4 Action Aid International mission statement

‘ActionAid lives by the following values: Mutual Respect requiring us to recognise the innate worth of all people and the values of diversity.

Equity and Justice requiring us to work to ensure equal opportunity to everyone, irrespective of race, age, gender, sexual orientation, HIV status, colour, class, ethnicity, disability, location and religion’

Source: ActionAid Annual Report 2006

⁴⁰ Criteria for selection of INGOs: i) those whose remit includes long-term development, while acknowledging the increasing difficulty of completely separating the developmental and humanitarian roles; ii) agencies engaged in local programming, and not just funding bodies iii) general development agencies rather than those with specific brief, for a particular client group e.g. women, or technical focus, such as water, health. Accessed 10 July 2008.

⁴¹ Oxfam 2006/7, Action Aid 2006, CARE USA 2007, Christian Aid, 2006/7, World Vision

The annual reports for the largest of the government bi-lateral donors, namely the Scandinavian countries, Canada, the USA and the UK, were silent on the subject of older people in respect of development programmes (as distinct from their disaster relief humanitarian programmes). They, like the INGOs, have been concentrating their programmes on assisting countries meet the targets set by the MDGs.

Denmark has long been one of the leading countries when it comes to development assistance, and is among the countries that give the most per capita. Denmark therefore often has a say in the greater context and actively contributes in the preparation of the major events.... It confirmed that the Millennium Development Goals must form the foundation for the poor countries' poverty reduction strategies (DANIDA, 2005:12).

Canada International Development Agency (CIDA), the lead agency for government aid in Canada, driven by the MDGs and its work in Africa (CIDA, 2006/07), did not mention older people or ageing. Similarly, USAID's Operational Plans for 2006 did not contain any terms relating to older people (USAID, 2006). The Swedish government agency (Sida) has taken 'rights' and the perspectives of the poor as its departure points for development, stating that it is working to:

...strengthen the possibilities available to poor people to assert their rights and interests. We work to strengthen the right of poor people to participate in decisions and to counteract discrimination (Sida, 2006:2).

Interestingly, Gorman (1999) has commented that a significant reason for the continuing poverty faced by older people is their lack of rights.

The UK government's Department for International Development (DFID) takes a wide-reaching approach to development. It has extensive programmes throughout the world and has traditionally been seen by other governments as being the lead bi-lateral agency for social development programmes (Green, 2002). Indeed, the UK is one of the few remaining governments permitted by the Indian government to play a substantial social development role in India. It is currently paying particular attention to the importance of research in building the necessary hard evidence for influencing policy and practice, and is looking increasingly at its responsibilities in relation to the impact of globalisation on LDCs (DFID, 2008a). Its public position on older people and ageing is not evident as indicated by the findings of a recent age audit of its key documents to systematically

assess policies, strategies and activities in terms of their implementation and their effect on the status of older people.

The overall finding is that according to publicly available documentation, DFID does not appear to include older people in its policy, giving them no positive role to play in development, nor dealing with their specific needs (CIDT, 2008).

Some have argued, (Tomasevski, 1989, Narman and Simon, 1999a), that the policy direction of the smaller INGO donors and bilateral agreements has been directly influenced by the multi-laterals, resulting in them pursuing the same policy directions.

There is today far less differentiation in donor policies than during the 1960s and 1970s, when a small group of 'progressive' social democratic states pursued substantially different agendas and were at times openly critical of the view from Washington and New York (Narman and Simon, 1999a:272).

It could be argued that this constrained approach has undermined the ability of those working on less popular aspects of development.

5.5 Concluding comments

The above shows that older people are absent from a wide range of strategic, funding-related and operational documents, that seek to further development for all. Although the stated mission of all the above agencies includes references to improving the quality of people's lives, however defined, and often includes a commitment to supporting marginalised groups, they do not appear to translate these statements and commitments into actions for the benefit of older people. There is little evidence that the age-related programmes have had much impact on the work of other UN agencies and funds, or on the policies and practices of UN bodies.

The current global social development priorities are promoting a wide range of cross-cutting programmes and approaches, including combating poverty, reducing conflict, improving social inclusion, lessening marginalisation and increasing participation and empowerment. The paramount focus is the successful achievement of the MDGs. Follow-up to the Madrid summit and its Plan of Action are regarded as the UN's platform for taking forward a programme on ageing and older people (Sidorenko, 2008). At the

practical level no formal mechanism exists for introducing the aspirations of MIPAA into the MDGs. Zelenev (2008) of DESA has acknowledged that:

without well-coordinated international cooperation, implementation of international policy frameworks on ageing, including the Madrid Plan, will remain uneven and insufficient ... measures to improve international cooperation, including technical assistance on ageing, should be given proper attention in the future implementation framework. Effective and efficient international cooperation would help to ensure that the international policy documents on ageing are being translated into practical programmes and projects with fruitful results, particularly in developing countries and countries with economies in transition (Zelenev, 2008b:175).

The preceding analysis has shown that at the global level older people are generally regarded as a potential financial burden, (World Bank, 1994), that their value has been marginalised and that their roles in society, notably as carers, volunteers and mentors, and as actors in development in their younger years are substantially ignored. The following chapters in Part III present a content analysis of a number of the documents discussed above.

Chapter 6 Method - Discourse Analysis

The introduction to this thesis outlined a two phase research strategy for investigating how older people have been represented in the discourse on international development. This chapter presents the methodology of the first phase: a discourse analysis on a corpus of documents on international development. The specific research questions for this are set out in Table 6. A corpus methodology, defined here as the close examination of a number of texts from different parts of the same institution (Fairclough, 1993b, Mayr, 2008) will be used to examine these two questions.

Table 6 Research Questions for Discourse Analysis

	Research Question	Planned evidence search
RQ1	How have older people been represented in key policy discourses on development from 1982-2007?	Examine how the key development theorists and IGOs are presenting older people in their reports and conferences
RQ2	Did the representation of older people change from 1982-2007 and if so, how?	Examine evidence of changed language use and incidence of reference to older people by IGOs

Chapter 2 indicated that there is little published literature which has considered the position of older people in international development as a whole. With notable exceptions (Vos et al., 2008, Lloyd-Sherlock, 2010), discussion about older people and development has been mostly in discrete areas, such as social pensions (Barrientos and Hulme, 2008), older people as caregivers (Okatcha, 1999), or the position of older people in interfamilial relationships (Schröder-Butterfill and Kreager, 2005, Cheung and Kwan, 2009). A substantial part of the ‘business’ of development is concerned with external interventions by international institutions, such as the UN, aimed at improving the circumstances of the poor and ‘empowering’ people to influence that improvement (Chambers, 1997, Hamdi, 2004). It is pertinent therefore to explore how the development discourse finds expression in the thinking and practice of these institutions (Ebrahim A., 2004). This present research thus examines, by taking a Foucauldian

approach described in Chapter 3, ‘how the fears, experience and inevitable physical deprivations of old age are shaped by the various institutional structures and practices we put into place to define and shape the various descriptive theories and welfare policies proposed in respect of aging (sic)’ (Culpitt, 2006:133). Because this study is concerned with the policy and programme outcomes of the ways in which older people are represented, the outcomes of the study extend beyond content analysis, and attend also to policy outcomes (Bryman, 2004). A comparable analysis of women and development is undertaken to see how the changing discourse, as described in Chapter 4.3, has impacted on policies and practices in respect of women. The results seek to contribute to an understanding of how the representation of older people has influenced practice and the allocation of resources towards meeting their interests.

The chapter is composed of the following sections: (i) the research strategy, covering the rationale for using discourse analysis and the selection of tools used in the analysis (see Section 6.2), (ii) the strategy for identifying the texts to be analysed (see Appendix 3 for range of documents explored), (iii) the strengths and challenges of the approach taken, and (iv) a summary of the main points from the chapter.

6.1 Research strategy

Discourse analysis is criticised because it can appear as a subjective means of analysing documents, one not supported by objective data (Widdowson, 2004). Acknowledging the risks of being seen as ‘selective, drawing upon apposite extracts to support the argument’ (Carabine, 2001a:301), or simply finding what the researcher theorised in the first place, a three-part methodology of word, context and narrative analysis was used which provided a linguistic analysis of the text and situated the data in an external framework, as suggested by Fairclough (1992). Chapter 3 noted that institutions construct their own representation of the world. Whether this is a conscious activity or not, it is possible to empirically investigate patterns of expression and favoured themes or subjects through use of corpus methodology, (Fairclough, 1993b, Mayr, 2008). The institution in question here is the UN system, which includes agencies and funds, such as UN-Habitat, UNDP

and WHO, and the Bretton Woods organisations. A selection of UN bodies, events and texts were selected for detailed examination. The strategy for the selection of these agencies, how the relevant texts were identified and the tools used are described and discussed in this chapter.

6.1.1 Rationale and validation

It was necessary that the material should be available for repeated review without interference or influence from the originators of the data, so that it retained its historical integrity (Krippendorff, 1980, Yin, 2003). The overall approach taken has drawn substantially on the elements of discourse analysis presented in the work of Fairclough (1992), namely: the text itself, intertextuality, and social practice, as described in Chapter 3. The use of intertextuality as a research method was particularly pertinent in this study. Intertextuality analysis acknowledges the existence of different types of discourse in a single institutional setting (Fairclough, 1993b, Mayr, 2008). For example, there are a number of discourse types in the UN, including the language of meetings, reports of international summits, public declarations and commitments. How these texts build on each other and are reworked ‘helps to make history and contributes to the wider process of change’ (Fairclough, 1993b:102). Many of the documents generated by the UN and its agencies are transparent as to how they intend to build on previous resolutions, summits, declarations and agreements, and on the work of each other as a means of seeking to promote and support change. Studies using a corpus approach (Ainsworth, 2001, Carabine, 2001b, Baker et al., 2007) also make it possible to explore how minority or disadvantaged groups have been constructed and to make comparisons between them, which can in turn assist in identifying possible interventions (Smith, 1998).

Maintaining reliability, consistency and neutrality in data gathering and analysis are essential to the quality and efficacy of the research (Rapley, 2007). Krippendorff (1980) describes three types of reliability pertinent to content analysis of text: (i) stability, in that the results are invariant over time; (ii) reproducibility; and (iii) accuracy. In order to ensure reliability and consistency the data were classified and analysed using the computer programme MAXQDA. MAXQDA is a qualitative data analysis software tool designed to help the systematic storing, retrieval, evaluation and interpretation of texts. It

is a particularly valuable tool for a corpus analysis because it facilitates the examination of more texts than would be feasible by hand, thus allowing for a greater cummulation of research findings (Weber, 1985, Silverman, 2005).

The overview of UN documents in the previous chapter has illustrated the paucity of direct references to older people. In order to gain as full a picture as possible within the constraints of this research, three different perspectives were taken for examining the documents. Table 7 presents a summary of the documents for analysis, the data pool from which the texts were identified and the different tools used for each set of documents.

Table 7 Summary of documents for analysis

	Guiding theme for review	Data pool	Documentation	Analytical tool
UN baseline - focus on older	i) UN focus on ageing	UN General Assembly	General Assembly Resolutions: 1987, 1997, 2007	Discourse analysis (DA)
	ii) Realisation of aspirations on ageing	UN General Assembly	World Summits on Ageing Plans of Action: - Vienna 1982 - Madrid 2002 ⁴²	KWIC DA
UN Agencies	iii) Review of landmark events in development	UN Summits and Declarations	Declarations and programmes of action ⁴³	Word frequency KWIC DA
	iv) Review of perspectives of key agencies	World Bank; UNDP; UNOHCHR	- World Development Reports - Human Development Reports - Right to Development Working Group minutes	Word frequency KWIC DA

⁴² http://www.monitoringris.org/documents/norm_glob/mipaa.pdf

⁴³ Eight summits and declarations: 1986 Declaration on the Right to Development; 1993 World Conference on Human Rights; 1994 International Conference on Population & Development; 1995 Copenhagen Declaration on Social Development; 1996 World Summit on Food Security; 2000 Millennium Development Goals; 2005 World Summit Outcomes; and 2006 Convention on Rights of Persons with Disabilities

First, a baseline of documents concerning older people was identified to provide ‘a control’ against which the texts from other agencies could be assessed. The baseline comprised three General Assembly Resolutions on Ageing and the action plans from the two World Summits on Ageing, held in 1982 and 2002. The status and representation of women was also reviewed in each of these.

Exploration of these baseline documents included identifying the language used by the protagonists to describe and promote the interests of older people. Second, an in-depth content analysis was undertaken of a set of texts from the World Bank, the UNDP and the OHCHR to identify how their representation and social construction of older people had changed over time (such as ‘vulnerable’, a ‘brake on development’, as ‘resources in development’) and the manner of inclusion (or exclusion) of older people from international policy agendas. For example, there are many instances when groups are listed together to draw attention to a common vulnerability, such as poverty, or to a need for basic infrastructure, such as transport. While these are of relevance to older people, the category ‘age’ or ‘older persons’ is frequently absent from the list. Third, the seminal texts from a number of landmark events in the ‘development’ calendar were examined to identify how the public debate and values, as represented by international summits and declarations, influenced or had been influenced by the discourse (Hall, 2001).

6.1.2 Analytical tools

The tools used needed to be able to reveal i) the contexts in which older people had been referred to, (ii) how they had been talked of, (iii) how their representation had changed over time and (iv) the circumstances in which they had been ignored (Fairclough, 2000, Hall, 2001). The same tools were used for identifying the changing status of women in development, on the selected sample of documents. Three units of assessment were used for the content analysis: the individual word (using word frequency), the context in which the recorded unit appeared (using key-word-in-context – KWIC), and the overarching purpose of the section or chapter in which the recorded unit appeared. The mix of units was used to enhance the validity of the research and to build up the evidence (Seale, 1999). The word frequency count was used for comparative purposes, to record the number of references to older people in relation to other social groups in order to give a

picture of the relative importance of different groups. An examination of how they were used in context provided a relational analysis to determine how older people, when visible, had been represented. A word frequency was thus also carried out on the key terms used for women and children across the corpus. In practical terms, every instance where ‘older people’ or a related term, (the research focus), were mentioned was noted and the different contexts in which they were mentioned was recorded. The aim was to build a picture of the extent to which the research questions were supported or contested. The elements aided by computer in this study were word frequency, category counts and context.

Given the formulation of some of the words relating to older people, such as ‘age’, ‘ageing’ and ‘aged’, it was essential to ensure that their use was unambiguous, valid for the research, and had ‘semantic validity’ (Weber, 1985).

Table 8 Content analysis: terms sought for older people, women and children

Category	Descriptor
Older Person:	Older people; ageing; aging; old; elderly; senior citizen/s, pension/s; aged
Presence of an older person:	Grandparent/s; intergenerational; elder/s
Possible presence of an older person:	Family; household; relation; kin; ‘today’s generations’, adults
Woman:	Female, gender, maternal/ity, mother, woman/en
Child:	Boy, child, girl, infant, young

Every occasion in which these words appeared was thus verified for their context ensuring, for example, ‘aged’ and ‘ageing’ were only recorded when used as descriptors of older people rather than as descriptors of, for example ‘children aged 10 – 15 years’, or in situations concerned with something else entirely, such as ‘ageing infrastructure’. In

order to reduce ambiguity in identifying the categories of persons under review in this study, the research identified all terms which referred either directly to the category in question, such as old or women, or which implied inclusion of the category, such as grandparent, or gender. These were used across all the documents. The distinction within the three categories of older people, as shown in Table 8, was important. In addition to direct references to older people there were instances in which older people were found by reference to another group or concept, such as intergenerational, where the purpose of the reference was concerned with the younger person, and the older person was the ‘bystander’ rather than the focus of attention. In other situations there were references, such as ‘household’ or ‘family’, indicating the possible presence of an older person, but where there was no evidence as to whether they were or were not included.

Having categorised all the terms, a sample of words and phrases, or themes, was identified. (Table 9) to ‘operationalise’ or focus on and identify patterns that were indicative of the research questions (Robson, 1993).

Table 9 Themes for content analysis

Theme	Full name	Terms covered
Posatt	Positive attitude	Contributor, participant, productive
Negatt	Negative attitude	Burden, destitute, needy, vulnerable
OPspecsup	OP specific support	Geriatric/ian, pensions, walking aids
Servdev	Service development	Clinics, hospitals, health care, education
Infra	Infrastructure	Housing, roads, utilities, water
Genlist	General listing	Lists of social groups who may be discriminated against or in favour of e.g. race, gender, disability

Both direct and indirect references to older people were sought. Direct references included searching for terms such as burden, mentor, problem, wisdom and so on. The

‘indirect’ and ‘absent’ themes were concerned with identifying references to the features of daily living that are relevant to all human beings, such as poverty, infrastructure, human rights, health care, and in which there was no stated reason why older people were excluded. Attention was paid to the role played by words regarded as having negative or positive connotations in relation to older people, such as ‘vulnerable’ or ‘dependent’ which are deemed to diminish the older person (Andrews, 1999), or terms such as ‘elders’ which has traditionally been seen as positive, to determine what, if any, was the dominant image in the texts. The themes identified emotional attributes, characterised by positive and negative attitudes towards older people (burden, contributor or problem); service recipients (such as pensions, social assistance, health care) and social characteristics, such as ethnicity, sex and disability. As older people were the focus of the research, these themes were sought in relation to older people in all the documents. A sample of these texts was selected for the comparative study with women and development. The paragraphs in which the key words appeared were then analysed by examining the situations in which older people were included or could have been included but had failed to be mentioned (Weber, 1985, (Huckin, 2002). For example, there were circumstances where lists of discriminated groups were highlighted for special attention but where neither older people nor ‘age’ were mentioned.

Contextual analysis and collocation of terms explored *how* older people were being represented in relation to other groups and to certain issues in development, such as poverty and human rights. The reach of this contextual analysis often went beyond the immediate sentence or paragraph to the section and chapter headings in order to identify whether older people would have a place in that part of the document, or whether it might be of exclusive value to another group, such as children. The intention was to identify where emphases lay in the texts and whether there were patterns in the way in which older people were represented.

6.2 Strategy for selection of texts

Two broad categories of text were identified for examination. The first related to documentation generated by the UN General Assembly that was specifically concerned with ageing (see page 122: Table 7.i and 7.ii), similar to the examination of the UN documentation on women and development in Chapter 4.3; and the second (Table 7.iii and 7.iv) were concerned with how other agencies within the ‘UN family’ addressed issues relating to older people. The purpose of this two-fold approach was to assemble a baseline, or ‘reference corpus’ (Mayr, 2008) of the UN’s stated position on older people against which other UN-supported global initiatives could be assessed. Identification of the key UN agencies and events for analysis drew on the literature and documents examined in Chapters 2 and 5.

The process of identifying the selection of the texts for each of the two stages is detailed below, and includes the rationale for the sample of agencies, the years selected from the 25-year period under review, and the particular type of text selected for examination.

6.2.1 UN focus on older people

A sample of UN General Assembly Resolutions on Ageing and the texts of the two international Plans of Action were selected as representative examples of the UN’s discourse on the role of older people in development. While Section 5 1.2 indicated that global ageing is a modestly resourced programme within the UN, it has been the subject of discussion at the UN General Assembly (GA) since 1948⁴⁴, and since 1978 has been the subject of an annual GA resolution on ageing. There were three purposes to examining these documents: first, to identify the different ways that older people are presented in that part of the international discourse in which they have primacy, second, to explore how the representation of older people changed between 1982-2007, the period covered by this study, and, third, to assess the level of progress on ageing issues between one Summit and the next. As noted earlier, 1982 was identified as the starting point for the study because it produced the first major global document to promote awareness of an

⁴⁴ The International community first took up the question of global ageing at the United Nations on the initiative of Argentina in 1948. The General Assembly adopted resolution 213 (III) concerning a draft declaration on the rights of the elderly. Source: <http://www.unac.org/iyop/unquest.html>

ageing world, the International Plan of Action on Ageing (IPAA). The GA resolutions on ageing in 1987, 1997 and 2007 were selected for examination. These offered a marker in each of the decades under consideration for identifying the changes during the period. The decision to start with 1987 for the GA Resolutions acknowledged that a period of learning, development and consolidation may have been necessary following the 1982 World Summit on Ageing and that the passage of five years would have been sufficient for agencies working in the international development field to have progressed on some of the recommendations from the IPAA.

6.2.2 Documentation from non-age specific UN activity

Given the large archive available and the lengthy time period under consideration, it was essential that the project was broad enough in scope to reflect the range of UN activities while remaining manageable (Fairclough, 1993b). Two key routes were pursued. First, a sample of key landmark events in the development calendar of the inter-government organisations (IGOs) and INGOs was selected in order to examine some critical moments in the progress of development from 1982 to 2007 (Pitanguy, 2002). Second, an in-depth study of a sample of UN agencies was undertaken to gain a greater understanding of the development discourse in relation to older people. Mayr (2008) has suggested that a principled selection of texts, either by pre-determined external criteria or by internal criteria makes it possible to ‘measure and examine the lexical choices found in [the] sample to understand the discourses’ (Mayr, 2008:139). In summary, the research strategy for identifying non-age specific documents from the UN archive involved four stages: identifying landmark events, identifying which agencies to explore in depth, which of the 25 years to focus on and which texts. The process for each stage is detailed below.

6.2.2. a Selection of landmark events

The global summits and events during the 25-year period selected were those at which poverty, population growth and social development were the overriding themes and hence events at which one might reasonably expect to see the interests of older people actively and explicitly raised. Examples of these events are the 1994 International Conference on Population and Development and the World Social Development Summits

of 1995 and 2005. The key events are indicated in the timeline (see Figure 3). The specific events selected for this study were identified from the grey literature reviewed in Chapter 5, through discussion with key informants in the field of international development and from a report to the General Assembly in 2006 on follow up to the World Summit (UN-ECOSOC, 2006).

Eight summits and declarations were identified as the landmark events (see Table 10). These events sought to reflect the most significant commitments to global social development and human rights over the last 25 years.

Table 10 Landmark events in the development calendar 1982-2007

Year	Event	Length and source of document
1986	Declaration on the Right to Development (New York)	5 pages (GA Res 41/128)
1993	World Conference on Human Rights (Vienna)	Declaration and plan of action 28 pages (A/CONF.157/23)
1994	International Conference on Population & Development (Cairo)	Summary of the Programme of Action 115 pages (A/CONF.171/13)
1995	Declaration on Social Development (Copenhagen)	29 pages (A/CONF.166/9)
1996	World Food Summit (Rome)	Declaration & plan of action 30 pages (W3613/E)
2000	Millennium Declaration (New York)	9 pages (A/Res/55/2)
2005	World Summit Outcome (New York)	38 pages (A/Res/60/1)
2006	Convention on Rights of Persons with Disabilities (New York)	29 pages (A/Res/61/106)

The Right to Development, for example, had yielded the rights-based approaches to development (Tsikata, 2007) and the MDGs were the international expression of a global agenda for reducing poverty in LDCs. Two ‘single-issue’ events with potentially direct implications for older people, the 1996 Summit on Food Security and the 2006 Declaration on Disability, were included in order to examine how the interests of older

people were attended to when the area of interest was more discrete. An overview was taken of women's role in development at four of these eight events (see also Chapter 4.3).⁴⁵

6.2.2. b Selection of UN agencies

The second step involved selecting the sample of UN agencies for examination. The UN consists of six main bodies, including the General Assembly with its separate 23 programmes and funds (such as the UNDP and UN-Habitat) and a further 15 specialist agencies (including the World Bank and WHO).

Table 11 UN agencies considered for analysis

Agency/Programme	Remit
United Nations Development Programme (UNDP)	<i>Generic:</i> UNDP is the largest provider of grants within the UN for sustainable human development worldwide ⁴⁶
UN Office of the Commissioner for Human Rights (OHCHR): The Right to Development ⁴⁷	<i>Generic:</i> OHCHR seeks to ensure that international human rights standards are implemented on the ground
UN Population and Development Fund (UNFPA)	<i>Generic:</i> promotes the right of every woman, man and child to enjoy a life of health and equal opportunity
The World Bank	<i>Generic:</i> The World Bank is one of the largest funders of structural development programmes
World Food Programme (WFP)	<i>Specialist health and social welfare:</i> supplements national food programmes in times of disaster
The World Health Organisation (WHO)	<i>Specialist health and social welfare:</i> the public health arm of the UN
UN Human Settlements Programme (UN-Habitat)	<i>Specialist health and social welfare:</i> assisting people living in health-threatening housing conditions

⁴⁵ The four events were the 1986 Right to Development, 1995 Summit on Social Development, t2000 Millennium Conference and 2005 World Summit

⁴⁶ Source [The UN in brief/ www.un.org/esa/about_esa.html](http://www.un.org/esa/about_esa.html)6-2-08

⁴⁷ The Declaration on the Right to Development⁴⁷ defines such right as "an inalienable human right by virtue of which every human person and all peoples are entitled to participate in, contribute to, and enjoy economic, social, cultural and political development, in which all human rights and fundamental freedoms can be fully realized (Article 1).

Thus the main task was to determine the criteria for the selection of UN agencies. Two key indicators were selected: the depth of engagement of the agency in global social and economic development, and the remit to work with all groups in society. Seven agencies were identified at this first stage (see Table 11). These were broken down into two further categories generic and specific, (see Table 11, column 2). The ‘generic’ agencies or programmes are broadly concerned with the overall welfare and interests of the individual, and the ‘specialist’ are those UN concerned with particular aspects of social and economic welfare. Each of the generic agencies was examined further to assess the degree to which the interests of older people were included in their wider policy discourses and frameworks.

Three bodies were ultimately selected for in-depth analysis: UNDP, the World Bank and the Office of the High Commissioner for Human Rights (OHCHR). Together these reflected the major paradigms in development during the period 1982 to 2007.

The UNDP, as the UN’s global development network, is the largest provider of grants for sustainable human development worldwide.⁴⁸ It considers itself an advocate for change and seeks ‘to connect countries to knowledge, experience and resources to help people build a better life’ (UNDP, 2007:4).⁴⁹ It is a decentralised, country-based organisation, working on the ground in 166 countries, assisting them to generate their own solutions to global and national development challenges. The World Bank was selected because it is the single largest provider of funding for structural reform within developing countries. It has considerable economic and social influence over the design of policies, and is thus in a strong position to take a lead for change (Chambers, 1997). Last, the United Nations Office of the High Commissioner for Human Rights (OHCHR) was selected because it represents the world’s commitment to the ‘universal ideals of human dignity’ and holds the mandate from the international community to protect and ‘actively promote universal enjoyment of human rights’ (UNOHCHR, 2000:6). It holds overall responsibility for promoting The Right to Development. The OHCHR was created in 1994, as a direct

⁴⁸ Source [The UN in brief](http://www.un.org/esa/about_esa.html)/www.un.org/esa/about_esa.html6-2-08

⁴⁹ Guidelines for an Assessment of Development Results (ADR) UNDP Evaluation Office, January 2007

outcome of the 1993 Vienna World Conference on Human Rights. The Office was established as a full department within the UN, and they published their first annual report in the year 2000.

6.2.2. c Selection of years for agency sample

Having identified the agencies for review, a sample of significant dates over the 25-year period was selected (Table 12). This was to provide a focus for the examination of the agencies and to enable an assessment of change over the period to be made.

The selection of years was based on the same principles as those used for women in development in Chapter 4. It drew on two considerations. The first was the significance of particular events that either should have or could have reasonably had an effect on policy affecting the lives of older people, and the second took account of landmark events in the international ageing and development calendar.

Table 12 Years identified for analysis reflecting significant events relating to older people

Year	Event	Year selected for comparative study with women = √
1982	1 st World Assembly on Ageing (WAA)	√
1983	WAA + 1	-
1990	Turn of decade	√
1991	Principles for Older Persons adopted by General Assembly	-
1994	Publication of <i>Averting the Old Age Crisis</i> (World Bank)	-
1999	International Year of Older Persons	-
2000	The Millennium	√
2002	2 nd World Assembly on Ageing	-
2003	WAA + 1	-
2007	5 year review of MIPAA 46 th Session of ECOSOC	√

The first category contained the opening year of each decade when the UN and the World Bank produce reports presenting their respective overview for the forthcoming decade. This offers the scope for assessing the level of awareness by the sample UN agencies;

and the years in which a major global position on development that would have as much impact for older people as the rest of the populations was taken, such as the adoption of the MDGs in 2000. The second variable took account of landmark events in the international ageing and development calendar: i) the year in which a significant global event pertaining to older people took place and ii) the year immediately following, such as 1982 (1st World Assembly), 1999 (International Year of Older People), and 2002 (2nd World Assembly). These included ‘ageing-related’ policy statements, such as the 1991 Principles for Older Persons, in order to identify what impact, if any, they had had on the agendas of the selected key UN bodies. The year 2007 was selected as the closing year for this research to mark the quarter century since the first World Summit on Ageing. A time distance of five years from the second World Summit on Ageing was also considered to be sufficient time to identify signs of change in discourse from 2002. 2007 was also the half way mark to achievement of the MDGs. Because of the much greater frequency of references to women/gender than to older people/age, a working sample of four of the ten dates was selected (see Table 12) for tracking the impact of the changing discourse on policy and practice for women and development: 1982, 1990, 2000 and 2007. These reflected the situation for women at the start and end of the time period under consideration and at two mid-way points.

6.2.2. d Selection of specific texts

The last stage in the selection of events, agencies and dates for review, was to identify which texts to examine. The range of documentation available from the UN ranged from the formal General Assembly resolution to international declarations of a few paragraphs only, lengthy action plans of many pages, and working papers of some technical detail produced for consideration by sub-committees of experts. Documents ranged in length from three pages, such as the UN General Resolutions, to the 300-page World Development Reports. Having established a method of searching lengthy documents with ease, through the use of MAXQDA, the important factor was to identify documents of comparable value in terms of their content and institutional status. In respect of the global setting landmark events the key documents emanating from them in the forms of declarations, conventions and plans of action were examined. These were chosen

because, having been agreed by global forums, they had been accorded world-wide credibility within the formal machinery of international development. In addition, they were high profile events with public visibility and accountability.

For each of the three agencies a range of documents produced by the respective bodies was surveyed to gain an overview of how older people, women, and children were represented and with what frequency. The basis for the decisions about which documents to examine differed. In respect of the World Bank and UNDP, it was decided to use their respective annual reports. For both agencies these are substantial documents that contain not only information about their work for the year but also their analysis of the world situation. These reports follow a set formula and lend integrity to comparing reports within a given agency. The documents were also of a comparable length, within and across both agencies. A different approach was taken in respect of the OHCHR. As they only produced their first annual report in the year 2000,⁵⁰ it was necessary to look to another set of texts from the OHCHR that would be meaningful for this research. Several genres of documentation were reviewed. The range included the meeting notes of the RtD Working Group, interim reports to the General Assembly from the High Commissioner for Human Rights, and a High Level Task Force set up in 2004 to further promote the 1986 Declaration. The RtD Working Group was selected as the body for examination, as the body propelling the implementation of the 1986 Declaration (Kirchmeier, 2006).

6.3 Strengths and challenges of the research methods used

The following section comments on the strengths and weaknesses of the research strategy, design, and methods used. Using content and inter-textual analytical tools made it possible to develop a ‘descriptive overview of the story’ (Flick, 2002:302) of how and where older people fit into the development discourse. The most evident strength of this methodology was the ease of access to an extensive body of documents with external

⁵⁰ A word frequency search of the OHCHR Annual Reports for the years relevant to this research did not reveal any references to older people.

validity. The accompanying challenge was to establish rigorous and systematic approaches for selecting the sample of texts for examination from such an extensive archive. These approaches were discussed in section 6.2.

6.3.1 Strengths of discourse analysis

An overarching strength in using discourse analysis for this study was the reliability of the data available. Using documents already agreed by international bodies ensured that the data had been accepted as providing legitimate accounts of given events and contained information and detail which had been deemed important to the originators. It also allowed broad coverage in terms of time, number of events and range of settings (Yin, 2003). The use of corpus methodology, in contrast to a more conventional critical discourse analysis, also avoided ‘over-privileging’ a single or limited range of texts (Mayr, 2008:139). It allowed historical data to be analysed without external influence because the data had already been prepared, is now virtually anonymous, and could be looked at without personal intrusion or influence. A notable strength of using data from the UN and its agencies was that they are credible, capable of being authenticated and, as they are publicly available, can be verified (Bryman, 2004, Denzin and Lincoln, 2008).

A simple word count of a particular category made it possible to indicate how one message source, such as the number of references to older people, varied over time (Weber, 1985). Because there were so few references to older people and ageing it was possible to explore more documents than might otherwise have been the case, and to carry out textual analyses on several of these documents. The introduction of the two categories, ‘presence of an older person’ and ‘possible presence of an older person’, broadened the scope for examination of the representation of older people, making it possible to examine the dynamics of inter-governmental agencies in depth in relation to their stated commitments about supporting all groups in society. By contrast, however, the extensive references to women and gender in all the documents meant that it was only possible to undertake an equivalent content analysis on a sample of the texts, as noted in Chapter 4.3 and in 6.2.2 above.

The advantages of using a computer-based discourse analysis tool fell into two main categories: the speed at handling large volumes of data, which freed up the researcher to explore analytic questions; and improving the rigour of the research, including the production of counts of phenomena.

6.3.2 Challenges of discourse analysis

Discourse analysis is ultimately a subjective endeavour. The construction of documents is not a neutral process, how to select a representative sample of texts for examination presents difficulties, and the textual analysis is subject to human interpretation.

Maintaining a position of neutrality when examining documents that are not necessarily neutral (Antaki et al., 2003) and producing a legitimate story where there is scope for ‘multiple understandings’ (Weber, 1985:128) is a significant challenge with discourse analysis. The researcher sought to address some of the difficulties at the outset by deploying a range of methods and tools, and establishing a number of benchmarks against which to assess data. The use of lexical frequency added a quantitative and objective measure to the research. Using it to identify references to women and children, as well as to older people, also provided an objective benchmark. The use of KWIC and the examination of different types of events provided a further means for establishing the ‘silence’ in the discourse and for corroborating the data.

A second challenge in using discourse analysis is the construction of a corpus of textual samples able to represent a fair and unbiased picture of the development discourse over a 25-year period. A construction of a timeline (Figure 3, Section 5.1.) assisted with the process of identifying key dates, and events and information from key informants contributed to refining the type of document to be reviewed. Establishing a baseline of texts (the GA resolutions on ageing and the World Summits on Ageing), to explore how language had changed over the 25 years helped maintain a focal point against which other texts could be assessed. The considered selection of genre and texts from a limited number of agencies further helped guard against the ‘double crises’ of representation and legitimacy, namely whether the selection could be justified and reviewed by others (Pitanguy, 2002, Rapley, 2007:128). Nonetheless there is subjectivity in the selection of

texts which in this instance the author sought to overcome by taking a balance of different socio-political organisational perspectives, from the economic focus of the World Bank, to human rights and social development of OHCHR and UNDP respectively.

It is acknowledged that the texts reviewed in this research have been prepared for a world-wide audience; and that the content of the documents has had to represent the interests and concerns of peoples from many different cultures, and for whom English, the language of this research, would not be the first language. Other technocratic features are also acknowledged, including the different ways of producing documentation, the ways in which different papers have been written, how the style of these has been set and by whom; whether there is an internationally agreed 'diplomatic' style to serve the purposes of many cultures; and whether the language aims to be consensual rather than polemical (Chambers, 1997). These features could affect the results because the very nature of producing documents for world-wide acceptance requires the distillation of discussion and hence reduced opportunity to appreciate the nuances of any debates that may have related to older people. It was not possible however to consider all these points in detail in the research, although the researcher was mindful of them and addressed them in the analysis where possible.

6.4 Concluding comments

The approach to discourse analysis used in this study has looked at how older people have been represented in written documentation, (including textual silences), and at the concomitant effect of this on the policy and programmes of the agencies explored. Discourse analysis has provided a valuable entry point for 'unravelling' how inter-government institutions, such as the UN and the World Bank that are directly concerned with international development, view older people. It has made it possible to reveal the focus of institutional attentions of these bodies and to enable an examination of trends over a 25-year period (Weber, 1985). The research design, combining elements of the planned with the emergent, made it possible to build on and learn from the research as it progressed. Initial findings from the analysis of the International Plans of Action on

Ageing, for example, informed the analysis of the non-age specific UN events and agencies. It has also demonstrated an additional value of the inter-textual approach to discourse analysis discussed in Chapter 3. The final chapter in Part III presents the results of the examination of the corpus.

Chapter 7 Findings - Discourse Analysis

It is essential to integrate the evolving process of global ageing within the larger process of development. Policies on ageing deserve close examination from the developmental perspective of a broader life course and a society-wide view, taking into account recent global initiatives and the guiding principles set down by major United Nations conferences and summits.
(MIPAA 2002 Annex 2 Introduction para 9)

This chapter presents the findings of the content analysis discussed in the previous chapter.⁵¹ The analysis seeks to identify the level of visibility of older people in comparison to other groups, to explore attitudes to older people and to illuminate the intentions, trends and power relationships of the UN institutions under consideration in this research (Fairclough, 1993b). The findings for each of the sections are divided into four themes. The first of these examines the form and style, or ‘texture’, of the texts (Fairclough, 1993b). The other three sections are framed around the research questions: (i) how older people are described and presented in the development discourse and how this changed over 25 years; (ii) how the international development agencies perceive their role in addressing the interests of older people; and (iii) how the different agencies perceive the role of older people in development. Attention is drawn to the changing representation of women during the period to provide a comparison with older people and development.

The analysis comprised three stages. Stage 1 examined how the UN General Assembly presents itself when its focus is directly on issues concerned with global ageing. It went on to explore how far the aspirations of the General Assembly were realised, through a review of its dedicated programmes of action, i.e. the Plans of Action on Ageing which emerged from the two World Summits on Ageing held 1982 and 2002. Together the GA Resolutions and the Plans of Action provided a baseline against which the remainder of the corpus of UN documentation was examined. Through a review of selected UN summits and declarations, the chapter explored how the major landmarks in development

⁵¹ A full list of texts examined, from which the corpus, was selected can be found in Appendix 3

from 1982 to 2007 incorporated an ageing and/or an older people's agenda in their respective discourses, and compared this with how women and children have been represented in those discourses. Table 13 below summarises the four genres of documentation selected for analysis. Column 2 indicates the key purpose for the selected genres, columns 3 and 4, the agencies and documents and column 5 shows the methods used for analysing each genre.

Table 13 Summary of documents examined

Chapter section	Key aim of section	Agencies explored	Documentation	Analytical tool
7.1	UN focus on ageing	UN General Assembly	General Assembly Resolutions: 1987, 1997, 2007	DA
7.2	Realisation of aspirations on ageing	UN General Assembly	World Summits on Ageing Plans of Action: - Vienna 1982 - Madrid 2002	Collocation DA
7.3	Review of landmark events in development	Summits and Conventions	Declarations and programmes of action ⁵²	Word frequency Collocation DA
7.4	Review of key agencies	World Bank UNDP OHCHR	- World Development Reports - Human Development Reports - Right to Development Working Group papers	Word frequency Collocation DA

Sections 7.1 and 7.2 present the analysis of the UN baseline texts: GA Resolutions on Ageing (section 7.1) and Plans of Action on Ageing from the two world summits (section 7.2). Themes identified from these baseline texts informed the analysis of the subsequent two sections, the landmark events (section 7.3) and UN agencies (section 7.4). A concluding section reflects on these findings and summarises the possible roles that older people could have been expected to play or contributed in each of the different arenas described.

⁵² See Chapter 6 Table 10 Landmark events in the development calendar 1982-2007

7.1 General Assembly Resolutions on Ageing

The General Assembly is the main deliberative, policymaking, and representative organ of the UN. Comprising all 193 members of the UN it provides a forum for discussion of the full spectrum of international issues covered by the UN Charter. General Assembly resolutions are voted on by all member states and usually require a simple majority to pass (50% of all votes plus one). They are non-binding towards member states and include recommendations for change. Every session of the GA since 1982 has received an update and passed a resolution on ageing. A sample of these resolutions, spanning three decades, was identified for this research. The years identified for analysis were 1987, 1997, 2007.⁵³ The basis for the selection of these years can be found in the previous chapter (see Table 12).

7.1.1 Form and texture

The three General Assembly resolutions selected were each agreed at an annual full meeting of the General Assembly. The papers were drafted before the meetings by the relevant department within the UN Secretariat. As language is the principle means by which the UN creates a coherent social reality world-wide, the language of each of the texts is formulaic and assumes a readership familiar with the approach. They share a common format in which the first few paragraphs remind, reaffirm, recognise and recall previous agreements and intentions. These are followed by several paragraphs of the hoped-for undertakings and expectations by national governments, UN bodies, NGOs and the private sector for the forthcoming year and beyond. The 1987 resolution contains 15 paragraphs concerned with forthcoming activity, 1997 has 23 paragraphs and 2007 contains 11.

The heading for each of the resolutions indicates the overarching political driver concerned with ageing at that point in time. The resolution for 1987 is titled 'Implementation of the International Plan of Action on Aging and related activities'; the 1997 resolution is headed 'International Year of Older Persons: towards a society of all

⁵³ 1987 - General Assembly 42/51; 1997 - A/Res/52/80; 2007 - A/Res/62/130

ages'; and 2007 is titled 'Follow-up to the Second World Assembly on Ageing'.⁵⁴ Each argues for more resources. The resolutions for 1987 and 2007 seek contributions to the UN Trust Fund for Ageing, while the 1997 seeks contributions to promote and develop activities for the forthcoming International Year of Older Persons (IYOP). Each resolution draws attention to other global initiatives which have a bearing on the interests of older people. The 1997 Resolution, for example, reminds the UN members of the 1993 World Summit on Human Rights, the 1994 International Conference on Population and Development, and the 1995 Summit on Social Development. All the Resolutions request that activities are reviewed and reports presented at the subsequent session of a General Assembly.

7.1.2 Describing older people

The 1987 Resolution referred to older people as 'the elderly'. In 1997 and 2007 the term had become 'older persons'. As mentioned earlier (see Section 2.2) there was acknowledgement that the use of the collective term 'the elderly' denied older people their individuality, implying that older people were a homogeneous group (James and James, 2004). This semantic shift could also be interpreted as reflecting the growing acceptance of the social, rather than medical model of ageing, presenting older people as being part of society at large rather than as an ascribed category (Gubrium, 2005). The spelling of 'ageing' moved from the USA usage of 'aging' to the now global UN spelling of 'ageing', indicating a move away from an American hegemony in the field. In terms of whether older people were seen as a homogeneous group or not, there was acknowledgement in the 1987 resolution of how national 'cultures and traditions' would impact differently on government approaches in responding to older people. Issues of diversity in 1997 appeared in terms of gender, in which the contributions from the CSW on the topic of older women in relation to the Year⁵⁵ were particularly welcomed. In 2007 diversity issues were present in relation to gender and disability and health status of older people (point 10); and each of the 'relevant' UN agencies was 'encouraged' to provide research funding to assist in gathering specific data on gender and ageing.

⁵⁴ Note different spellings of ageing in 1987 and 2007 documents

⁵⁵ The 'Year' refers to International Year of Older People (IYOP)

Special attention was also given to women in the 2007 Resolution (point 1) in which governments were encouraged to be particularly mindful of poverty among older women.

In 1997 governments were reminded that ageing societies would be a ‘major challenge’ of the 21st century, noting a requirement for a ‘fundamental change in the way in which societies organise themselves and view older persons’ (GA1997:2, para2). By the time of the 2007 resolution, older people had been afforded a role in development: governments were being encouraged to seek ‘greater consultation with older persons in the course of developing, implementing and monitoring poverty eradication plans’ (ibid). This was a significant shift: between 1987 and 2007 the perception of older people had moved from being viewed as passive observers to being active participants.

7.1.3 Engaging the inter-government organisations

While each Resolution stressed that national governments were responsible for addressing issues of ageing populations within their own countries, the bodies of the UN were also called upon to play a role. This became more evident and specific as the decades passed. In 1987 the call was a general one requesting

[T]he Secretary-General to strengthen the existing programmes on aging⁵⁶, as well as the United Nations system-wide co-ordination in this field (1987: point 10).

In 1997 the UNDP and the international financial institutions were singled out to play lead roles, and UNESCO was appreciated for collaborating in a worldwide poster competition for IYOP. The GA Resolution for 2007 went further, encouraging

the international community and the relevant agencies of the United Nations system, with their respective mandates, to support national efforts to provide funding for research and data-collection initiatives on ageing ... (2007: point 7).

Later sections of this chapter assess the impact of this recommendation.

7.1.4 The role of older people in development

There was a high level of convergence during the period 1987-2007 for ensuring the inclusion of older people in development. The resolution in 1987 stated that: ‘the elderly

⁵⁶ Note North American spelling of ‘aging’.

must be considered an important and necessary element in the development process at all levels within a given society'. The opening paragraphs of the 1997 resolution reminded members that 'older persons must be considered an important and necessary element in the development process at all levels within a given society' and the 2007 resolution:

Reiterate[d] that ongoing efforts to achieve the internationally agreed development goals, including those contained in the United Nations Millennium Declaration, should take into account the situation of older persons (2007: para 11).

However, a distinct shift could be seen in the perception of how older people could or should be engaged in the processes of development over those 20 years. In 1987 there was no mention of the role of older people could play. The substance of the 1987 document was otherwise concerned with supporting and encouraging the efforts of others, such as the newly established UN supported International Institute on Aging (sic), in Malta. Paragraph 1 of the 1997 resolution talked of the 'individual and social needs of older persons [and] the contribution of older persons to societies' continuing in paragraph 5 to encourage member States in

offering older persons opportunities to utilise their experience and knowledge to promote a society for all ages... so that they can contribute to and benefit from full participation in society (1997, point 5).⁵⁷

Older people were seen here as individuals having value and a role to play. By 2007 Governments were being asked to pay attention to:

building capacity to eradicate poverty among older persons, particularly older women, by mainstreaming ageing issues into poverty eradication strategies and national development plans (2007, para 1).

It called on governments to create conditions that would enable families and communities to provide care and protection for people as they aged, with the emphasis being placed on strengthening structures to enable the interests of older people to be incorporated into the mainstream of development. Capacity-building had become the norm at all tiers of agency: associated now with strengthening the self, the organisation and the cause (Ebrahim A., 2003).

⁵⁷ The expression 'a society for all ages' has become widely used in the ageing field. It formed part of the conceptual framework for the International Year of Older People in 1999 '*Towards a Society for All Ages*', and formed the title of the UK's government's policy on ageing: *Building a Society for All Ages* (2009)

Overall there appears to have been a discursive shift during the period 1986-2007 in how older people were being viewed in development: moving from their position as potential beneficiaries of state provision to their playing a role in the development of community in the 1990s, to their role as individuals in the new millennium, holding rights individually and collectively as a category in society.

7.2 Realising Aspirations - World Summits on Ageing

The modern world has unprecedented wealth and technological capacity and has presented extraordinary opportunities: to empower men and women to reach old age in better health and with more fully realised well-being; to seek the full inclusion and participation of older persons in societies; to enable older persons to contribute more effectively to their communities and to the development of their societies; and to steadily improve care and support for older persons as they need it (Article 6 MIPAA, 2002).

7.2.1 Form and texture

The above Article from MIPAA captures the aspirations for meeting the reality of a global ageing population. As noted in Chapter 5, the 1982 International Plan of Action on Ageing (IPAA) was the first international instrument on ageing, guiding thinking and the formulation of policies and programmes on ageing globally. It was agreed at the 1st World Summit on Ageing, attended by over 1000 delegates, with representatives from over 40 member states (Sen, 1994). The Plan's stated aims were to strengthen the capacities of governments and civil society to deal effectively with the ageing of populations, and to address the developmental potential and dependency needs of older persons. The Plan was made up of four main sections in 118 numbered paragraphs. Section 1 provided an introduction that set out the demographic background and presented the developmental and humanitarian aspects of ageing. A set of 14 principles concerning the scope of development as a whole and the value that all people could bring to it made up the second part, as set out in the following paragraph:

...to improve the well-being of the entire population on the basis of its full participation in the process of development and an equitable distribution of benefits there from (1982:25a).

It added later in the document:

The Plan of Action should be considered within the broader context of the world's social, economic, cultural and spiritual trends, in order to achieve a just and prosperous life for the aging, materially as well as spiritually (1982:25j).

Sections 3 and 4 of the IPAA presented broad guidelines for the international community, governments and society at large to 'meet the challenge of the progressive aging of societies and the needs of the elderly all over the world' (Section III A para 1), and offered 61 recommendations on specific 'areas of concern to aging individuals'. These included health, protection, income and education; 'promotional policies and programmes' concerned with research and training and a final section outlining the ways and means of implementing the Plan. It called on national governments and the international organisations to play their part through allocating time and financial resources. The Plan was written in the third person. This created a formal approach and a sense of distance between the creators of the programme of action and those who were to benefit from it.

The Madrid Plan of Action on Ageing consisted of a Declaration comprising 19 Articles and a Plan of Action comprising 35 objectives and 239 recommendations for action, contained in 135 numbered paragraphs. The Plan emerged from the 2002 World Summit on Ageing held in Madrid, attended by representatives from 159 countries and nine international UN agencies. Like the Vienna Plan, MIPAA was about both an ageing society and older people. Its concern was with ageing societies that included older people of 'today' and the growing older population of 'tomorrow'. The recommendations for action were organised to meet three priority directions:

older persons and development; advancing health and wellbeing into old age; and ensuring enabling and supportive environments (MIPAA, para 14).

In contrast to the Vienna Plan, MIPAA used the personal pronoun 'we', which could be interpreted as creating an arena for greater active engagement by all and a situation in which all parties had responsibility to effect change. This was a substantive shift from the Vienna Plan in which 'we' was not used at all, and 'us' appeared three times, in the

context of learning from older people about end of life issues, as illustrated in the following quotation:

Not only by his life, but indeed by his death, the older person teaches us all a lesson (UN, 1982: B para 15).

The Madrid Plan of Action was also more sensitive to differences across the globe, addressing, on the one hand, the interdependence of economies, and on the other, highlighting differing concerns for different regions and countries. For example it acknowledged the role of rural communities in developing countries: ‘trends suggest that in the future in rural areas of many developing countries, there will be a larger population of older persons’ (MIPAA, para 5). In the developed countries it drew attention to meeting the care needs of the oldest old (80 and over) who represented a group of growing concern for the West.

Both Plans stressed that the primary responsibility for the implementation of the Plans rested with individual national governments (1982, para 86; 2002, para 116), but with an emphasis on the need for partnerships between Governments and all parts of civil society, including ‘retirees’ and elderly people’s organisations’ (ibid). The Plans were both principled and practical. They offered underpinning values for the ways in which both an ageing society and older people should be regarded, and made recommendations for practical ways forward, from individual responsibility through to national and international programmes, as articulated in Article 17 of MIPAA.

Governments have the primary responsibility for providing leadership on ageing matters and on the implementation of the International Plan of Action on Ageing, 2002, but effective collaboration between national and local Governments, international agencies, older persons themselves and their organisations, other parts of civil society, including non-governmental organisations and the private sector is essential (Article 17).

Responsibility was widely distributed from the individual to local, national and international; from specific actions to systemic change; and, with the adoption of the life-course perspective, the Plans appeared to afford responsibility to all at all stages of life. Mirroring the discursive shifts of the GA Resolutions (see Section 6.2.2) three substantial changes concerning the locus of responsibility for their implementation were evident in

the Plans. Firstly, although there were references to the value of older people, as indicated in the quotation below (IPAA, para 23), the overriding approach of the Vienna Plan related to the health and material needs of older people, thus indicating a rather limited set of responsibilities towards older people.

The presence of the elderly in the family home, the neighbourhood and in all forms of social life still teaches an irreplaceable lesson of humanity (IPAA, para 23).

By contrast, The Madrid Plan sought both to ensure that the voices of older persons were included and that they were viewed as individuals with aspirations for self-development and growth. Secondly, over the 20 years between the Plans, there was an increased emphasis on the role that the private sector should play in realising the aspirations of the Plans. This change in emphasis can be seen when comparing MIPAA Article 17 (see previous page), in which the role of the private sector through working in partnership with governments and public bodies was seen as essential, with the following paragraph from the Vienna Plan in which the private sector would ‘probably’ have a role to play:

The role of the public and private sectors in assuming responsibility for some of the functions now provided by the family in developing countries will probably have to increase under such circumstances (IPAA, para 33).

The third discursive shift was how recommendations for action were expressed. Many of the recommendations in the Vienna action plan included the phrase ‘Governments should...’ giving the impression that not only was the relationship one-way but one that lacked an understanding of the very different economic circumstances, constraints and abilities of many nations to meet the recommendations (Cohen, 1992). Twenty years later witnessed a greater understanding of these different circumstances.

The common features of the nature of ageing and the challenges it presents are acknowledged and specific recommendations are designed to be adapted to the great diversity of circumstances in each country. The Plan recognises the many different stages of development and the transitions that are taking place in various regions, as well as the interdependence of all countries in a globalising world (MIPAA, para 10).

The presentation of the MIPAA was formulated to present key objectives followed by a series of actions that would achieve those objectives. It was a more outcome-focused

approach that sought to gain meaningful change, rather than a series of commands to be followed. The Madrid Plan also acknowledged the limited actions that had been taken by the international government bodies in responding to ageing societies. For example, paragraph nine of the plan implied that the debates and results of recent UN summits needed to absorb the context of the changing demographic and be aware of how their current practice might affect the lives of future older people.

It is essential to integrate the evolving process of global ageing within the larger process of development. Policies on ageing deserve close examination from the developmental perspective of a broader life course and a society-wide view, taking into account recent global initiatives and the guiding principles set down by major United Nations conferences and summits (MIPAA para 9).

Equally, paragraph nine could be viewed as a reminder to all those working in development that, as signatories to the IYOP held only three years earlier, the declarations and programmes emanating from all international development conferences and summits should be working for the benefit of all.

7.2.2 Describing older people

There was no definition given of 'old'. Reference was made to 'persons over 60' in the second paragraph of the Action Plan in which the demographics were projected till 2050. The IPAA acknowledged that 'old age' was a process as well as a point of chronology, as indicated by the quotation below:

As the transition into old age is a gradual and individual process, notwithstanding the statutory retirement age limits adopted in some countries and cultures, all policies and programmes should be based on the fact that aging is a natural phase of an individual's life cycle, career and experience, and that the same needs, capacities and potentialities usually prevail over the entire life-span (IPAA, IIIAA).

The growth in number of those aged 80 and over was noted in both Plans. MIPAA further described the demographic shift of decreasing numbers of young people, and increasing numbers of those over the age of 80, as a way of presenting a changing image of world society – of one that was moving from young populations to older populations. It otherwise did not elaborate on what was meant by 'old' or 'older' or that it may mean different things in different cultures. The term most commonly used for older persons in

the Vienna Plan was ‘the elderly’, followed by ‘the ageing’. The emphasis in the MIPAA was on ‘older people’ rather than on ‘ageing’, with more than three times as many references to the former. Terms used for older people in MIPAA were: ‘old age’, ‘persons 60 years and over’, ‘older population’, ‘older persons’ and ‘higher age groups’. Other descriptors were deployed in specific contexts, such as ‘elder’ in ‘elder abuse’ and ‘elder care’, suggesting a more nuanced response to particular situations. In addition to specific terms for older people, a number of encompassing terms were used: ‘persons as they age’, ‘age discrimination’, ‘ageing and age-related’ issues, all of which refer to people becoming old, but not necessarily to those over 60 years of age.

Older people were seen as a heterogeneous group and their different needs and interests were noted throughout both Plans. In particular, specific attention was paid to gender, older people with disabilities (mental and physical in the 2002 Plan, a distinction not made in 1982), the oldest old (those over 80 years) and older migrants. The MIPAA further acknowledged indigenous groups and minorities. Attention was afforded to different groups in different situations, to older women in rural areas for example, and to different domestic arrangements, such as older persons living alone or with family, as highlighted in the quotation below:

Older women in rural areas are particularly vulnerable economically, especially when their role is restricted to non-remunerated work for family upkeep and they are dependent on others for their support and survival (MIPAA para 29).

References to gender differences or older women arose in a number of ways: as a feature of demographic change, of ensuring gender equality, of highlighting that older people are made up of men and women, as opposed to simply being a homogenous group, and as a group with distinctive needs, as described in the paragraph below:

The situation of older women everywhere must be a priority for policy action. Recognizing the differential impact of ageing on women and men is integral to ensuring full equality between women and men and to the development of effective and efficient measures to address the issue. It is therefore critical to ensure the integration of a gender perspective into all policies, programmes and legislation (MIPAA, Introduction para 8).

The Plan goes on to suggest ways of encouraging women’s integration, for example organisations could:

- (c) Focus support on older persons in rural areas without kin, in particular older women who face a longer old age, often with fewer resources;
- (d) Give priority to the empowerment of older women in rural areas through access to financial and infrastructure services; (MIPAA, Para 33 Objective 2)

These two examples indicate a broader understanding of women's interests by helping to both formalize their role in the economy and to build their capabilities to remain within their communities.

Although the language differed in the Plans, the underlying themes appear to be the same: that older people have something to contribute and that they should continue to be recognised as having a role to play in society, contributing economic, social or spiritual benefit to others. These are evident in the selected paragraphs below.

The spiritual, cultural and socio-economic contributions of the aging are valuable to society and should be so recognised and promoted further. Expenditure on the aging should be considered as a lasting investment (IPAA, 25(e)).

The social and economic contribution of older persons reaches beyond their economic activities... They make many valuable contributions that are not measured in economic terms: care for family members, productive subsistence work, household maintenance and voluntary activities in the community. Moreover, these roles contribute to the preparation of the future labour force (Article 19, MIPAA).

7.2.3 Engaging the inter-government organisations

Both of the Plans highlighted the importance of international action and cooperation, and set out the responsibilities for the international community, particularly those bodies which were part of the UN.

The General Assembly, the Economic and Social Council and all its appropriate subsidiary bodies, particularly the Commission for Social Development, the Governing Council of the United Nations Development Programme, and the legislative and policy-making bodies of the concerned specialised agencies and intergovernmental organisations are urged to give careful consideration to the Plan of Action to ensure an appropriate response to it (1982: para 95).

The expressions 'careful consideration' and 'an appropriate response' indicated encouragement but did not provide a programme of activity. Twenty years on, the

MIPAA (paras 124 – 128) took an approach that set out different responsibilities for the range of UN agencies and institutions in terms of funding, research and monitoring, and provided mechanisms aimed at supporting the implementation of the Plan. As illustrated in the paragraph below, there is clarity about the locus of responsibility for overseeing activity following the Summit, something which had not been apparent in the 1982 Plan.

As the focal point on ageing in the United Nations system, the primary action of the Department of Economic and Social Affairs programme on ageing will be to facilitate and promote the International Plan of Action on Ageing, 2002, including: designing guidelines for policy development and implementation; advocating means to mainstream ageing issues into development agendas; engaging in dialogue with civil society and the private sector; and information exchange (MIPAA, 2002: para 127).

The UN regional commissions were also afforded responsibility for translating the International Plan of Action on Ageing, 2002, into their regional action plans (MIPAA: para 128).

Representatives of governments at the Second World Assembly reaffirmed the theme of the 1999 IYOP, ‘Towards a Society For All Ages’, acknowledging the multigenerational, multidimensional and multi-sectoral aspects of ageing. They also affirmed the principles and recommendations of the 1982 Vienna International Plan of Action on Ageing, endorsing its continuing legacy and relevance. The Vienna Plan contained a substantial and dedicated section on international and regional cooperation (1982: paras 94 – 114):

Governments, national and local non-governmental voluntary organisations and international non-governmental organisations are urged to join in the co-operative effort to accomplish the objectives of the Plan (IPAA para 99).

The key UN bodies present at the 2002 Summit on Ageing included WHO, Habitat, UNFPA, and the World Bank.⁵⁸ There was no record that UNDP, the largest agency and funder of development programmes, or UNIFEM, (which had the global lead on women and gender issues at that time), had attended. However, the importance of international

⁵⁸ The other UN agencies were the International Labour Organisation, World Tourism Organisation, the Food and Agriculture, the International Atomic Energy Agency, the United Nations Volunteers, (Source: Report to General Assembly, 24 June 2002 p4)

action and cooperation were highlighted at several points throughout the 2002 declaration and action plan. The statement ‘We underline the important role of the United Nations system’ (Article 18), expressed a very clear expectation of the UN’s position in relation to an ageing society and older people. On a practical level, ‘The Plan of Action calls for the United Nations System Chief Executives Board for Coordination to include system-wide implementation of mainstreaming of ageing issues in its agenda’ (MIPAA, para 19). It noted the insufficiency of funds available to affect the MDGs but failed to comment on the invisibility of older people in the MDGs (MIPAA para 93).

The major United Nations conferences and summits and special sessions of the General Assembly and review follow-up processes have set goals, objectives and commitments at all levels intended to improve the economic and social conditions of everyone. These provide the context in which the specific contributions and concerns of older persons must be placed (MIPAA para 12).

The implication from MIPAA is that all UN bodies need to acknowledge that they have a role in contributing to the wellbeing of older people.

7.2.4 The role of older people in development

The Vienna Plan (1982) noted the low numbers of older people in developing countries, and made a clear division between the humanitarian and developmental responses that would be required to meet the ageing demographic. Humanitarian responses would aim to meet specific current and future needs, such as health and nutrition, housing, environment, social welfare, income security, employment and education. The developmental issues related entirely to the socio-economic implications of an ageing population on the economy and society as a whole. Neither response afforded older people an active role in the development of their societies: in both circumstances it appeared that they were to be beneficiaries of, rather than contributors to, decisions about their lives and livelihoods. However, in looking to the future, it stated

Eventually, the transition to a positive, active and developmentally oriented view of ageing may well result from action by elderly people themselves, through the sheer force of their growing numbers and influence. The collective consciousness of being elderly, as a socially unifying concept, can in that way become a positive factor (IPAA, para 32).

In recognition that developing countries would not have the resources to implement development policy for ageing populations, the Vienna Plan suggested that it would be necessary:

to establish a new economic order based on new international economic relations that are mutually beneficial, and that will make possible a just and equitable utilisation of the available wealth, resources and technology (1982 para 15).

This statement came just at the time when world economies were moving from a period of wealth redistribution in the 1970s, into a period in which the West began to exert greater control of social and public expenditure of the LDCs, through the strictures of the SAPs (refer Chapter 2). By the time of the Madrid Summit, the paradigm shift in development during the 1990s to a more human rights approach, made it possible for the Madrid Plan to highlight that older people are an integral part of the processes and success of development, and that they too are entitled to a fair consideration of resources for development, as indicated in the following quotation:

The mobilisation of domestic and international resources for social development is an essential component for the implementation of the International Plan of Action on Ageing, 2002 (MIPAA, para 92).

The Plan states that the success of adapting to an ageing world would be measured in terms of social development, not just economic development, which had been at the forefront of development for the previous two decades. The policy directions of the Plan are towards improving the quality of life of the older person and building the sustainability of the various formal and informal systems that underpin the quality of wellbeing throughout the life course (MIPAA Annex 2 para 14).

Paragraph 12 of the MIPAA invokes many mainstream development concerns, showing how they are relevant and applicable to older people in much the same way as for the rest of society. The expressed concerns include: security, empowerment, provision of opportunities and combating discrimination. This list is framed by references to human rights, thus underscoring the value of the older person as an individual as well as being a member of an ageing society. The methods for achieving these goals are also no different, and include:

Facilitating partnership between all levels of government, civil society, the private sector and older persons themselves in translating the International Plan of Action into practical action; (MIPAA para 12(i)).

There are many references to the interdependence of generations and to the dual roles that older people play in their communities as both givers and receivers of care and support and educational and learning opportunities; as dependents and those to be depended upon; and as providers and recipients of economic resources.

The perspective on the older person can indeed be seen to have changed over the 25 years, in particular, from being seen as primarily a person with needs to a person able to self-manage and contribute. Four themes were identified from the GA and the International Plans as representing the perceived value of older people in development. These are that older people are needed (Chakraborty, 2001, HelpAge International, 2003); that older people have needs (Estes, 1999b, Minkler and Cole, 1999, Harper, 2006); that older people have aspirations (Andrews, 1999, Bowling and Dieppe, 2005); and that older people are simply part of society, with no labelling or justification being required for their existence (Nussbaum, 2000, Fraser and Honneth, 2003). The term 'older people are needed' acknowledges that older people contribute to their communities, but perhaps more importantly, that their input is needed and communities would be diminished without that contribution. These are now explored below in more detail and contribute to the analysis of the case study in Part IV of this thesis.

7.2.4.a Older people are needed

Both Plans made reference to the important role older people make as citizens in society as a whole and as individuals in their families. The IPAA identified for example:

that an important objective of socio-economic development is an age-integrated society, in which age discrimination and involuntary segregation are eliminated and in which solidarity and mutual support among generations are encouraged (Principle II para 8).

The Madrid Plan offers more explicit examples of the ways in which older people are needed in society. Of note is the repetition of the value accorded older people beyond their economic and financial roles. This reflects the wider paradigm shifts in development from economic growth to human development.

The social and economic contribution of older persons reaches beyond their economic activities...They make many valuable contributions that are not measured in economic terms: care for family members, productive subsistence work, household maintenance and voluntary activities in the community. Moreover, these roles contribute to the preparation of the future labour force (MIPAA, para 19).

Objective 2, para 41 of MIPAA states how the ‘social, cultural and educational knowledge and potential of older persons’ can be used in mentoring, mediating and advisory roles to young people; and in providing ‘traditional and non-traditional multigenerational mutual assistance activities ... in the family, the neighbourhood and the community’. Article 10 states that:

The potential of older persons provides a powerful basis for future development This enables society to rely increasingly on the skills, experience and wisdom of older persons, not only to take the lead in their own betterment but also to participate actively in that of society as a whole (MIPAA, Article 10).

Although both Plans referred to mutual support between generations the only direct reference in the IPAA focused on what the young could do for the old:

The involvement of young people -- in providing services and care and in participating in activities for and with the elderly -- should be encouraged, with a view to promoting intergenerational ties (IPAA: Recommendation 32).

Twenty years later, the references to intergenerational relationships in MIPAA are more numerous, varied and meaningful for the individual and society. The first point of note is that the intergenerational relationship is now seen to be two-way. Paragraph 43 of MIPAA states that such relationships:

work in both directions, with older persons often providing significant contributions both financially and, crucially, in the education and care of grandchildren and other kin (MIPAA, para 43).

This is a significant move from the 1982 Plan in which older people were seen as the beneficiaries of the attentions of younger people. A second major addition to the value of generations working together is acknowledgement in The Madrid Plan that everyone in society has a role in creating and maintaining societies that are socially cohesive (MIPAA, Article 16).

We recognize the need to strengthen solidarity among generations and intergenerational partnerships, keeping in mind the particular needs of both older and younger ones, and to encourage mutually responsive relationships between generations (article 16).

Solidarity between generations at all levels in families, communities and nations has been recognised as an essential element in the achievement of a society for all ages (UN, 1995d). It is also regarded as prerequisite for social cohesion and the foundation of formal public welfare and informal care systems (Engelman and Johnson, 2007).

7.2.4.b Older People have needs

Older people were recognised in the Plans as having a wide range of needs. These extended beyond the normative income-related or physical health and care concerns. Reference was made to social isolation, the loss of social networks as families migrate to cities or to other countries, a lack of a supporting infrastructure in cities, and a lack of participation in community and public life. Both Plans offered a range of ways of meeting these needs. These included encouraging mutual self-help initiatives, ensuring older people were informed of what support was available, eliminating preferential treatment for other groups and investing in affordable and accessible services, as indicated in the quotations below.

Mutual self-help among the able and active elderly should be stimulated to the extent possible, as should the assistance this group can provide to its less fortunate peers, and the involvement of the elderly in informal part-time occupations (IPAA, Recommendation 32).

Effective care for older persons needs to integrate physical, mental, social, spiritual and environmental factors (MIPAA, para 69).

It could also be argued that the different types of intervention suggested, from community development to infrastructure development, acknowledged that needs could be met by different types of resource investment and by different agencies. For example, the Madrid Plan of Action calls on a broad range of interdisciplinary activities to support the health care needs of older people, stating that the health sector should be joined by ‘many other social and economic sectors’ (MIPAA, Article 14). The Plan also states that ‘older persons are fully entitled to have access to preventive and curative care, including rehabilitation and sexual health care’ (MIPAA, para 58).

MIPAA highlights in the section headed ‘Universal and Equal Access to Health Care Services’, that there is a potential for older people to receive poorer treatment at the expense of others.

Older persons can experience financial, physical, psychological and legal barriers to health-care services. They may also encounter age discrimination and age-related disability discrimination in the provision of services because their treatment may be perceived to have less value than the treatment of younger persons’ (MIPAA, para 70).

This was the only occasion in the Plan where older people were presented as a body having potentially less value than other groups in society.

7.2.4.c Aspirations of older people

There were numerous references in both the IPAA and MIPAA noting that older people have aspirations and expectations beyond their physical care and support needs. The terms used to express this included ‘self-fulfilment’, ‘personal satisfaction’ and ‘self expression’

Policies and action aimed at benefiting the ageing must afford opportunities for older persons to satisfy the need for personal fulfilment, which can be defined in its broader sense as satisfaction realized through the achievement of personal goals and aspirations, and the realization of potentialities. (IPAA: Section A Goals, para 10).

Both plans were mindful of different practical factors that could either inhibit or encourage the realisation of personal aspirations. Article 2 of the Madrid Declaration on Ageing advocates there should be ‘particular opportunities for older persons to realise their potential to participate fully in all aspects of life.’ Paragraph 12(d) of MIPAA offers suggestions of practical support that could help make older people’s aspirations a reality.

Provision of opportunities for individual development, self-fulfilment and well-being throughout life as well as in late life, through, for example, access to lifelong learning and participation in the community (MIPAA, para 12(d)).

While the IPAA highlighted that:

elderly pedestrians have to cope with objective or subjectively felt dangers that restrict and limit their mobility and participatory aspirations (IPAA: section Housing and Environment).

Paragraph 20 of MIPAA further suggests that participation in social, economic, cultural, sporting, recreational and volunteer activities would contribute ‘to the growth and maintenance of personal well-being’. Interestingly, this was the only occasion in the Madrid Plan of Action where ‘wellbeing’ was mentioned on its own, and not in partnership with ‘health and wellbeing’. Given that health is viewed as just one of the contributing factors to wellbeing the constant pairing of the two terms in the Plan could be construed as placing an emphasis on a medicalised approach to old age (Easterlin, 2003).

Overall there was strong recognition that as people age they still have aspirations that can and need to be met.

7.2.4.d ‘Being there’ - no justification necessary

Finally, it is worth noting an additional perspective on older people that reaches beyond whether they are useful or not as a group of people, or whether they need to justify themselves in society. The Madrid Plan raises this through statements such as:

Older persons should be treated fairly and with dignity, regardless of disability or other status, and should be valued independently of their economic contribution; (MIPAA, para 21(g));

Whatever the circumstances of older persons, all are entitled to live in an environment that enhances their capabilities (MIPAA, para 94).

It could be argued that the above quotations indicate a human rights approach to an ageing population and older people. Issues of human rights for older persons were taken up in 1991 in the formulation of the United Nations Principles for Older Persons. Indeed MIPAA categorically states that one of its central themes is:

The full realisation of all human rights and fundamental freedoms of all older persons (MIPAA, para 12a).

These statements could be viewed as a licence to be old as well as to grow old.

7.2.5 Concluding comments

In summary, the three General Assembly Resolutions and the two Plans of Action on Ageing have provided a significant body of guidance to the international community and

individual countries on how to address the interests of older people. Although the incentives have been weak and there are no mandatory requirements on member states, there has been a high degree of flexibility in all of the statements on ageing to allow for responses that can be adapted to suit the circumstances of the intended implementing parties.

Several discursive shifts took place over the 25-year period in relation to how older people were represented by those who have made public statements furthering the interests of older people globally. The nomenclature changed from the abstract term of ‘the elderly’ to ‘older people’, indicating an increasing awareness that older people have separate identities; older people moved from being represented as passive beneficiaries to active participants in development; and international institutions and the private sector were afforded greater responsibility in responding to the changing needs of an ageing society. Finally, there was a marked discursive shift between the 1982 and 2002 Plans in how older people and development bodies were ‘invited’ to play their respective roles. The move from the directional ‘should’ approach of the 1982 Plan to the acknowledgement in the 2002 Plan that bodies needed to reflect and respond appropriately, indicated a greater understanding of the different needs and circumstances of older people and a greater commitment to improving their situation.

7.3 Review of landmark events

A sample of eight landmark events in international development during the period 1982 to 2007 was examined to present a broad perspective on the representation of older people. A word frequency count and analysis was carried out on the declarations and action plans that emerged from the events. The results of the word frequency count are presented in Table 14. The table shows a very low representation of older people in all of the key documents. Documents from three of the events do not record any interest in older people, whereas references to women appear in all and to children in all but one.

Table 14 Frequency counts on landmark events

Year	Event	References to older people	References to women	References to children	Length of document
1986	Declaration on the Right to Development (New York)	0	4	0	5 pages (GA Res 41/128)
1993	World Conference on Human Rights (Vienna)	1	63	54	Declaration and plan of action 28 pages (A/CONF.157/23)
1994	International Conference on Population & Development (Cairo)	7	92	56	Summary of the Programme of Action. 115 pages (A/CONF.171/13)
1995	Declaration on Social Development (Copenhagen)	6	48	28	Declaration + commitments 29 pages (A/CONF.166/9)
1996	World Food Summit (Rome)	0	31	8	Declaration + plan of action. 30 pages (W3613/E)
2000	Millennium Declaration (NY)	0	8	17	9 pages (A/Res/55/2)
2005	World Summit Outcome (NY)	1	45	23	Resolution 38 pages (A/Res/60/1)
2006	Convention on Rights of Persons with Disabilities (NY)	2	19	36	29 pages (A/Res/61/106)

Notes: a) A/Res = adoption of a resolution at a GA meeting; b) The breakdown of categories for older people, women, and children are shown in Chapter 6, Table 8; c) The events highlighted in grey are the subject of further analysis in section 7.3.

With the exception of the Declaration on the Right to Development in which there were very few mentions to any of the three population groups, the difference in scale of representation between the three population groups is substantial. The greatest number of mentions of older people and ageing (n=7) appeared in the 1994 International Conference on Population and Development. Yet this was insignificant compared to the references to women (n=92) and to children (n=56) in the same document, indicating their focus on a population that consisted of the young and excluded the old. Two other events of particular note, because of their centrality to the broader development agenda, were the

2000 Millennium Declaration and the 2005 World Summit Outcome. The former makes no reference to older people, while there were eight references to women and 17 to children. The World Summit Outcome is explored in more detail later in this section, but it is worth mentioning here that only one reference was made to older people, whereas there were 45 references to women and 23 to children.

An analysis of the sample texts, see Table 15, shows three instances in which older people as a group were viewed as ‘needed’, or as contributors to their society as a whole.

Table 15 Perceptions of older people in development in landmark events

	1986 Right to Devpt	1993 World Conf on HR	1994 ICPD	1995 Social Devpt Sum't	1996 World Food Sum't	2000 Millen -ium Sum't	2005 World Sum't	2006 Disab- ility Conv'n
Needed	0	0	1	1	0	0	1	0
OP have needs	0	1	4	4	0	0	0	1
Aspira- tional	0	0	1	1	0	0	0	1
‘Being there’	0	0	1	0	0	0	0	0

The ICPD stated that

Governments should also seek to enhance the self-reliance of elderly people so that they can lead healthy and productive lives and can benefit society by making full use of the skills and abilities they have acquired in their lives (ICPD, 1994 para 96).

This positive comment is of particular note in an otherwise lengthy document in which there are very few references to older people. Yet one of the key motivations of the ICPD was to increase life expectancy so that populations everywhere could live longer lives.

Countries with the highest levels of mortality should aim to achieve by 2005 a life expectancy at birth greater than 65 years and by 2015 a life expectancy at birth greater than 70 years (1994 para 112).

Noticeable by its absence are references to people living healthy and fulfilled lives. There was recognition that increasing numbers of older people could ‘benefit society’, but none of the texts address the implications of this. One of the references to ‘age’ in the 1995 World Summit Declaration is all encompassing and encouraging:

the contribution of people of all age groups as equally and vitally important for the building of a harmonious society and foster dialogue between generations in all parts of society (UN, 1995d: Commitment 4(h)).

The only context in which the 2005 World Summit mentioned older people was as carers.

To gain a more detailed picture of how the summits and declarations represented older people, an in-depth discourse analysis was carried out on three of these sets of documents. To maintain subject consistency with other sections of this chapter, the focus was placed on rights, human development and poverty, as represented by the 1993 World Conference on Human Rights, the 1995 Copenhagen Declaration on Social Development and the 2005 World Summit Outcome (highlighted in grey in Table 14).

7.3.1 Form and texture

7.3.1.a World Conference on Human Rights 1993 Vienna

The text for the World Conference on Human Rights 1993 consists of a Declaration with 39 numbered paragraphs, and a programme of action with a further 61 paragraphs. The Declaration contains one reference to older people.

Consistent with other UN documentation, the preamble to the declaration reaffirmed and recognised past conventions and declarations, including the UDHR. It expressed deep concern about the discrimination experienced by women. The preamble moved on to acknowledge change and the new world order, expressing a determination to ‘take new steps forward in the commitment of the international community’ (para 16). It was concerned with all human rights: political, humanitarian, civil, social, economic and cultural, acknowledging extreme poverty as an inhibitor to the achievement of human rights (para 14). It reiterated that ‘the human person is the central subject of development’ (para 10), as stated in the Right to Development. The most substantive part of the Plan of Action’s six sections (Section B) was headed ‘Equality, dignity and

tolerance' with subsections on '1) Racism, racial discrimination, xenophobia and other forms of intolerance'; 2) Persons belonging to national or ethnic, religious and linguistic minorities' (including 'Indigenous People'; and 'Migrant Workers'); 3) Equal status and human rights of Women'; 4) The Rights of the Child'; '5) Freedom from Torture'; and '6) The Rights of the Disabled Person'. All of these called on and reiterated earlier and related declarations.

Section 1 of the Action Plan consistently emphasised a respect for all in society. No justification was provided for the inclusion of certain groups, as listed above, or the exclusion of others such as older people. It should be noted that at the time of the Action Plan the interests of some of the named categories, such as women and children, were already covered by dedicated international conventions. But as the Declaration on Migrant Workers was not passed until 2003, and the Convention for People with Disabilities was only agreed in 2006, this can not be offered as grounds for the inclusion of certain groups. Indeed, had this been a prerequisite for inclusion, the World Summit could have called on the United Nations Principles of Older Persons adopted by the UN General Assembly (resolution 46/91) in December 1991 to justify a position on older people. The remainder of the 1993 Action Plan addressed areas of 'cooperation, development and strengthening of human rights', implementation and monitoring. There were some references to groups 'which have been rendered vulnerable' (para 67), but these groups were not specified. Women were mentioned 12 times in the body of the text and in the separate section afforded them (Section II paras 36-44), many of the points noted could equally have applied to older women. Older women were not, however, highlighted, in contrast to the interests of girl-children.

The World Conference on Human Rights urges Governments, institutions, intergovernmental and non-governmental organisations to intensify their efforts for the protection and promotion of human rights of women and the girl-child (1993 Programme of Action: para 19).

The section devoted to the rights of the child stated specifically that 'The World Conference on Human Rights ...Underlines the importance of major national and international efforts ...for promoting respect for the rights of the child to survival,

protection, development and participation' (1993: Article 45). There was nothing similar in use for older people in any part of the text.

7.3.1. b Declaration on Social Development 1995

The Declaration consists of four parts in 29 numbered paragraphs: i) the introduction comprising 12 statements reinforcing the values of social development, ii) 'Section A: The Current Social Situation and the reasons for convening the summit', iii) 'Section B: Principles and Goals'; and iv) 'Section C: Commitments'. Older people were mentioned seven times in the Declaration.

Section A set out the reasons for convening the summit and identified the gains and losses arising from globalisation. These included the growth in prosperity accompanied by 'unspeakable poverty' for others, social disintegration, isolation and marginalisation (paras 14 and 16). Paragraph 15b specifically applauded the increase in life expectancy as an example of progress in social and economic development, while paragraph 16 noted the continued growth in world population and its changing structure. It highlighted gender inequality, but made no mention of an ageing population or increasing numbers of older people. Other minorities were referred to in some detail, including people with disabilities, indigenous people, refugees and internally displaced persons, and women and children. In addition to the direct references to older people, there were sections where the unstated intention concerned future older people. One such area was to do with health. The Principles and Goals looked towards creating a framework that would: 'fulfil our responsibility for present and future generations by ensuring equity among generations' (1995: B26b). Section C consisted of ten commitments, each of these identified actions to be taken at the national and international levels.

The Copenhagen Declaration on Social Development was written in plainer, less bureaucratic language than the World Summit on Human Rights and used the personal pronouns 'we' and 'us' throughout the text, suggesting an approach of inclusivity or solidarity (Fairclough, 2000, Mayr, 2008). It appeared to be seeking to be more 'user-friendly' as reflected in paragraph 24 in which the signatories to the Summit declaration set themselves the challenge of taking a 'people-centred' framework for social

development (1995: para A24). Developing the theme further, the use of the term ‘we’ also implied that there was a ‘they’ or a ‘them’, which in turn suggests different positions of power, in which one set of individuals representing their respective countries and institutions, was passing judgment on others. The technocratic issues to which Ebrahim (2004) referred may have had a role to play here with people from varying professional backgrounds preparing texts that conformed to the culture and requirements of different agencies and divisions (Ebrahim A., 2004).

7.3.1. c World Summit Outcome 2005

The 2005 World Summit was a follow-up meeting to the UN 2000 Millennium Summit, which had resulted in the MDGs. The World Summit Outcome Resolution placed a particular emphasis on sustainability. It consisted of 178 numbered paragraphs. These addressed agriculture and education, investment and debt, war, sanctions and terrorism, human rights (reiterating the named categories in the 1948 UDHR)⁵⁹, regions with special needs, women and children, migration, refugees and displaced persons. The text comprised four sections addressing: Development, Peace and Collective Security, Human rights and the Rule of Law, and Strengthening of the United Nations. Like the World Summit on Development it also used the personal pronoun ‘we’ as a means of engaging with its audience.

Issues of a growing ageing population, the impact of today’s migration on older people or the different health needs of older people, were not considered at all, although concerns expressed in the Summit were about both the present and the future. There was only one direct reference to older people in the World Summit Outcome. In respect of this the following two quotations present clear examples of the conference’s priorities in terms of population groups

We reaffirm that gender equality and the promotion and protection of the full enjoyment of all human rights and fundamental freedoms for all are essential to advance development and peace and security. We are committed to creating a

⁵⁹ 2005 World Summit Outcome, para 122. ‘We emphasize the responsibilities of all States, in conformity with the Charter, to respect human rights and fundamental freedoms for all, without distinction of any kind as to race, colour, sex, language or religion, political or other opinion, national or social origin, property, birth or other status’.

world fit for future generations, which takes into account the best interests of the child (2005: para 12).

And in the chapter headed ‘Eradication of Poverty’:

Among people living in poverty, gender disparities are marked, especially in the increase in female-maintained households. With increasing population, the numbers of youth living in poverty will increase significantly. Therefore, specific measures are needed to address the juvenilisation and feminisation of poverty (2005, para 22).

The Summit addressed a future in which women and children appear to have primacy. Yet the text fails to acknowledge that ‘future generations’ will always be made up of young and old, as younger people become old. A world fit for future generations is thus likely to be an aspiration of all, and one in which the needs and interests of all ages will be met.

The section headed ‘System-wide coherence’ drew attention to the different elements of the UN that would be able to support the intentions of the 2005 World Summit Outcome.

We recognize that the United Nations brings together a unique wealth of expertise and resources on global issues. We commend the extensive experience and expertise of the various development-related organisations, agencies, funds and programmes of the United Nations system in their diverse and complementary fields of activity and their important contributions to the achievement of the Millennium Development Goals and the other development objectives established by various United Nations conferences (2005: para 168).

However, as noted earlier in Chapter 5 of this thesis, there are no dedicated funds and agencies within the UN to support older people.

7.3.2 Describing older people

There were a total of eight references to older people in the three texts (see Table 14).

They were referred to as ‘the elderly’ in the Vienna Declaration on Human Rights (1993 para 29), as illustrated in the quotation below:

The World Conference on Human Rights is deeply concerned about violations of human rights during armed conflicts, affecting the civilian population, especially women, children, the elderly and the disabled (1993 para 29)

Given that ‘human rights’ is fundamentally about the individual, it seems anomalous that a document on Human Rights was still describing groups using the abstract term ‘the’ rather than deploying the more widely accepted social model that affords individual identity. ‘Older people’ was the term used in the 1995 and 2005 Summits. ‘Old age’ was also a category in a list of groups for whom policies should be developed to ensure adequate economic and social protection in the 1995 Summit.

Older people were represented as a homogeneous group, without distinctions being made concerning social, economic or cultural differences among them. Three of the references represented older people as being either vulnerable or living in vulnerable situations, as shown in the quotations below. The first reference to older people in the Copenhagen Declaration appeared in a section that recognised that ‘too many people, particularly women and children, are vulnerable to stress and deprivation’ (1995:A16), continuing in sub-section (h) to include older persons in a paragraph alongside people with disabilities:

One of the world's largest minorities, more than 1 in 10, is people with disabilities, who are too often forced into poverty, unemployment and social isolation. In addition, in all countries older persons may be particularly vulnerable to social exclusion, poverty and marginalisation (1995: para A16h).

The 2005 World Summit Outcome acknowledged the vulnerability of older people in relation to HIV/AIDS. Their interests would also be met in a proposed substantial package of support for the treatment and care of those affected by AIDS, as stated in the following paragraph:

Developing and implementing a package for HIV prevention, treatment and care... and working towards the elimination of stigma and discrimination, enhanced access to affordable medicines and the reduction of vulnerability of persons affected by HIV/AIDS and other health issues, in particular orphaned and vulnerable children and older persons (2005: para 185 (d)).

The other references in the Summit Outcome text were to ‘age’ rather than to older people per se.

7.3.3 Engaging the international bodies

Each of the Summit meetings represented substantial preparatory input in terms of constructing agendas and drafting papers, from senior level policy makers of national governments, international government bodies and non-international government organisations around the world and technical experts. Further, they required the attendance and active input of the individual agencies and collective bodies to create meaningful and purposeful outcomes. All meetings were well attended by a cross-section of world regions plus, variously, a range of UN bodies including: UNDP, UNFPA, UNESCO, UNICEF, UNAIDS, UNIDO, FAO, the World Bank, the IMF; some inter-governmental bodies: the African Union, European Commission, League of Arab States, Organisation for Economic Cooperation and Development (OECD) and Organisation of the Islamic Conference; and a number of INGOs. It is noteworthy that the international financial organisations were also actively engaged in this group, demonstrating their interest in the broader social elements of development.

In playing an active role in the formulation of the declarations, in realising the intentions of the Summits, and in defining their respective roles in the delivery of the various Agreements, each of the agencies held some responsibility for reflecting and enhancing the dominant development discourses of the time (Narman and Simon, 1999a, Ebrahim A., 2004).

7.3.4 The role of older people in development

An analysis of the role older people were seen as playing in development, as expressed at the key international events examined in this section, was somewhat constrained by the paucity of references to older people. The data on its own is therefore only able to give an impression of how older people were regarded (Table 16). There were four references to 'older people have needs' in the Social Development Summit. These reflected a diversity of need: from older people as victims in situations of war and disaster, to having health-related concerns to experiences of isolation, poverty and deprivation.

Table 16 Perceived role of older people in development by selected agency

EVENT PERCEPTION	1993 Conference on Human Rights	1995 Social Development Summit	2005 World Summit
Older people are needed	0	1	0
Older people have needs	1	4	1
Aspirational	0	1	0
'Being there'	0	0	0

The only direct reference to older people in the 1993 Conference on Human Rights was in relation to the wider violation of human rights during armed conflict, as quoted below:

The World Conference on Human Rights is deeply concerned about violations of human rights during armed conflicts, affecting the civilian population, especially women, children, the elderly and the disabled. The Conference therefore calls upon States and all parties to armed conflicts strictly to observe international humanitarian law... as well as minimum standards for protection of human rights, as laid down in international conventions (1993: para 29).

Clearly the reference is to one of older people having needs alongside other vulnerable groups. However although it is the only direct reference it is a particularly valuable recognition in a context in which the interests of older people frequently go unnoticed (Lipman, 2005a). The only other meaningful reference to older people, albeit that it is indirect, is in the context of the impact of the life-course on women's health, as noted below:

The World Conference on Human Rights recognizes the importance of the enjoyment by women of the highest standard of physical and mental health throughout their life span (1993: para 41).

As carers of grandchildren bereaved by HIV/AIDS older people can be perceived as having a dual role: as a contributor to development and a person with needs. Frequently the sole remaining carer the older person plays a valuable and supportive role in development through their direct engagement in raising the next generation (World

Summit Outcome, 2005: para 57d). At the same time, the additional work and stress can take a toll on their health. In this respect their needs as people directly affected by HIV/AIDS were also taken into account, as noted in an earlier commitment made by the Social Development Summit to reduce the:

...vulnerability of persons affected by HIV/AIDS and other health issues, in particular orphaned and vulnerable children and older persons' (UN, 1995d: para 57d).

The Principles and Goals of the 1995 Copenhagen Declaration drew attention to the quality of lives of older people, as part of a broad commitment to improving the quality of life of all people:

We heads of State and Government are committed to a political, economic, ethical and spiritual vision for social development that is based on human dignity, human rights, equality, respect, peace, democracy, mutual responsibility and cooperation, and full respect for the various religious and ethical values and cultural backgrounds of people. Accordingly, we will give the highest priority in national, regional and international policies and actions to the promotion of social progress, justice and the betterment of the human condition, based on full participation by all (UN, 1995d: para 25).

To this end they stated that they would create a framework for action to: 'Improve the possibility of older persons achieving a better life' (ibid para 26q).

7.3.5 Concluding comments

This analysis of documents from the summits and declarations of a sample of landmark events in the development calendar of the last 25 years has shown a low visibility of older people. The interests of older people were not reported on at all in three of the eight events, whereas women appeared in the texts of each of the events and children in all but one. Where older people were represented the emphasis was on their having needs rather than on their playing participative role society. It is significant that during a period in which human rights was very much to the fore, represented by the Vienna Declaration of 1993 and reiterated in the later documents researched, that the interests of certain social categories have been continually ignored. The following section explores this in more detail through an in-depth study of seminal texts from three international agencies, each of which has global and far-reaching influence development policy and practice.

7.4 Review of key agencies

This section presents the last of the four stages examining UN documentation. It reviews how three distinct agencies within the UN system acknowledge an ageing agenda, and notes the factors that influence their priorities, and which groups they have privileged. Reports from the World Bank (World Development Reports), UNDP (Human Development Reports) and the OHCHR (Reports of the Working Group on the Right to Development) were examined for references to older people, women and children; and for the context in which references to older people were made. The findings from the three bodies are presented together under each of the four sections: form and texture, describing older people, engagement of international organisations and the role of older people in development. It was not the intention to compare activities of the World Bank, the UNDP and the OHCHR, but to take an overview of their representation of older people, in comparison to women and children.

7.4.1 Form and texture

The World Development and Global Human Development Reports (WDRs and HDRs) are substantial annual documents produced by the World Bank and the UNDP that are available to the public from the World Bank and UN respectively. Each year they focus on a particular aspect of development selected, in the case of the World Bank, by the Bank's president, and for the UNDP by a global panel of experts, overseen by the Human Development Report Office. They both consist of two parts; the first part of the WDRs and HDRs provides a text on a particular theme, and the second part provides sets of indicators. For the World Bank these are the World Development Indicators, which provide selected social and economic data (for 130 countries in 2007). For UNDP they are the Human Development Indicator tables, providing data of country achievements in different areas of human achievement, such as economic performance, literacy and gender inequality. These covered 175 UN members in 2007/08. The references to older people were mostly to be found in the case studies and quotations which each report contains.

The first WDR was produced in 1978. It is the World Bank's 'major analytical publication'.⁶⁰ Each report focuses on a specific aspect of development. The reports are prepared by a team of staff and consultants, under the guidance of the Chief Economist. The first HDR was produced in 1990. It introduced the first mathematical formulation for assessing human development. Each report has subsequently presented agenda-setting data and analysis, calling international attention to issues and policy options that put people at the centre of strategies to meet the challenges of development today - economic, social, political, and cultural. Although sponsored by UNDP and containing a foreword from their Director, the HDRs do not represent the official views or policies of UNDP. Reports are a collective venture, produced by the UNDP staff team and steered by an independent advisory panel made up of those with expertise in the theme of that year's Report.

The Right to Development (RtD) texts lie within the genre of UN documentation, which follows a standard format for formal notes of UN meetings. All minutes are available to the public from the OHCHR website. The notes provide an update and progress review on the implementation of the RtD. The 'Open-ended Working Group' consists of a core of experts from fifteen UN member states. Contributions from and invitations to attend meetings are extended to all members of the UN and other UN agencies. At the 2002 Open-ended Working Group of the Right to Development (RtDWG), it was reported that there was insufficient action following from the meetings:

The Chairperson-Rapporteur noted that [the Working Group] should not restate its positions but try to give practical recommendations concerning some of the problems that had been identified (OHCHR, 2002: 22 para 60).

This gave an intimation of openness and willingness to challenge the norms of these meetings and that pursuit of the subject is more important than the formalities of the process.

All of the texts for all three sets of reports contain terms that appear to encompass all sections of society, such as 'users', 'consumers' and 'households', or include all groups

⁶⁰ Source: World Bank website <http://go.worldbank.org/MPUHAJOPF0> accessed 1 March 2011

within certain social categories such as ‘the poor’, the landless’ or ‘the vulnerable’. However broader definitions of who is encompassed by these terms are not provided and there is no evidence to suggest that older people have been included in any of them. Until 2007 the WDRs continued to use the American spelling of ‘aging’.

7.4.2 Describing older people

A word frequency count of the selected texts (Table 17) identified few references to older people. Where they were found (and the term most commonly used was ‘the elderly’), they were usually located with ‘the disabled’, ‘the infirm’, or ‘extremely destitute, the sick and the aged’ (WDR, 1990:138). In the 1991 WDR older people were presented as potential beneficiaries of ‘carefully targeted income-support programs for the elderly or the infirm [to] provide safety nets for people who are otherwise hard to reach’ (WDR 1991:64). This gives an impression that older people are seen as part of a group of dependent or vulnerable people. The only instance in which older people were talked about as a group in their own right was in reference to a case study in China in the 1982 WDR, where they were regarded as having a small economic role to play in their community.

The WDR for 1994 ‘Infrastructure for Development’ explored the ways in which developing countries could improve both the provision and quality of infrastructure services, such as utilities, public works and transport. Consistent with the World Bank’s seminal work, ‘Averting the old age crisis’, produced in the same year, on improving pension provision for an ageing society (World Bank, 1994), the report contained 19 references to older people, of which 13 were concerned with pension funds. This could be considered, what will be called here, an ‘inclusive assumption’. A reference to ‘pensions’ indicates, or assumes, an interest in the income of older people, but as indicated in Chapter 2, most older persons in LDCs are not in receipt of an old age pension.

Table 17 Word frequency for older people in sample of UN agencies

Year	Agency Global Event	World Bank: World Dev Reports Refs to OP/ no. pages in report	UNDP: Human Dev Reports Refs to OP/ no. pages in report	OHCHR: Right to Development Working Group Refs to OP/ no. pages in report
1982	1 st World Assembly on Ageing (WAA)	5	-	-
		186	-	-
1983	WAA + 1	2	-	-
		228	-	-
1990	Turn of decade	42	4	-
		274	189	-
1991	Principles for Older Persons adopted by General Assembly	14	11	-
		304	202	-
1994	<i>Averting the Old Age Crisis</i> World Bank publication	19	5	1
		270	226	29
1999	International Year of Older Persons	23	11	0
		312	172	31
2000	The Millennium	81	5	0
		335	309	24
2002	2 nd World Assembly on Ageing	0	9	1
		264	292	46
2003	WAA + 1	8	11	0
		276	368	21
2007	5 year review of MIPAA 46 th Session of ECOSOC	38	23	0
		336	399	20

In contrast there were 74 references to women and 24 to children (see Appendix 4, Table 1). The foreword maintained that ‘infrastructure is an area in which government policy and finance have an important role to play because of its pervasive impact on economic development and human welfare’ (WDR, 1994: iii). In rural areas especially, potential earning time is lost because women often spend long hours fetching water, gathering fuel

or carrying crops to market; girls and women have been prevented participating in evening training classes because of a lack of transport (WDR, 1994:20).

The beneficial impacts of infrastructure on women can be profound, often extending beyond the commonly cited impacts of water and sanitation infrastructure on household health or women's time allocation. But ensuring such outcomes requires foresight and attention to detail during project planning... Predicting the impact of infrastructure on women can be difficult and requires a close understanding of the details of their activities, opportunities, and constraints (WDR 1994:85).

It asserts that the 'involvement of users and other stakeholders', along with commercial management and competition, are key to increasing efficiency, meeting 'customer demand', providing choices to users and improving performance.

It is particularly important to ensure that participatory processes involve all groups of beneficiaries, including women (who are often primary users of water and irrigations facilities) and others who may be disenfranchised, such as the very poor and landless (WDR 1994:77).

Older people are also users and consumers and, as noted earlier, infrastructure such as transport is essential for the inclusion of older people in society (Grieco, 2001). As older people are mentioned only six times in the whole report it could be interpreted that they were of little interest to the main discourse, and had no importance as 'users' in the eyes of the World Bank.

The WDR for 2000/01 'Attacking Poverty' brought a different perspective on older people.

Addressing the needs of the elderly poor ...requires more than pensions. Preventive measures include facilitating saving and investment and providing poverty reduction programs during people's working lives. Different forms of direct and indirect support are needed for today's elderly. Programs can provide assistance to families that care for live-in elderly. Retraining and workfare programs adapted to older workers can make it easier for them to continue working. And social assistance or social pensions should cover the poorest and the very old (categories that frequently overlap) and those without family support. Widows will often make up a large part of this group (WDR, 2001:154).

This was the first indication that older people were part of a mainstream affected by the social and economic pressures of the everyday, experienced by all other groups, and whose later lives were part of a life course. Suggestions were also made that 'social

policies should facilitate access to community groups or associations that cater to the elderly' (ibid:152).

Table 18 World Development Reports: word frequency for older people, women and children

	Report focus	Older people	Women	Children	Main contexts in which older people mentioned
1982	Agriculture	5	29	40	Case study re: food security for Chinese elderly
1983	Management: people centred	2	17	24	2 on pensions
1990	Poverty	42	198	244	24: needy, poor, disabled, destitute, vulnerable or infirm. 5: pensions
1991	The Challenge of Development	14	114	178	1 intergenerational
1994	Infrastructure for development	19	73	24	1 'elderly' 13 pension funds
1999	Entering the 21 st century	23	47	91	13 pensions 3 intergenerational
2000/01	Attacking poverty	81	595	328	47 refs in Chapter 8: <i>Helping Poor People to Manage Risk</i>
2002	Building markets	0	12	22	0
2003	Sustainable development	8	62	85	1 intergenerational 2 elders
2004 *	<i>Making services work for poor people</i>	9	62	300	4 elderly 3 pensions
2007	Devpt and the next generation	38	841	2735	11 intergenerational

*NB: 2004 has been added to this review of WDRs.

Thereafter the WDRs pay considerably less attention to older people (Table 18). It could be argued that the World Bank had made its case for older people in its turn-of-the-decade report and so had made its contribution to the forthcoming World Summit on Ageing. And in contrast to the MDGs in which there was no mention of older people, the World Bank had recognised the very mixed experiences of the lives of current and future older people.

7.4.3 Engaging the inter-government bodies

Many of the texts sought the inclusion and support of other UN bodies and other international agencies. Of the many facets of development and solution-based activities that were explored, such as multi-disciplinary dialogue, participation, accountability, globalisation, sustainability, mainstreaming and budgetary assistance, there was not a single one of those well-used expressions and well-acknowledged values that could not have equally applied to older people.

Throughout the nineties the World Bank appeared to indicate through its WDRs and elsewhere⁶¹ an interest in the changing population and growth of the older population. In its 1990 report the World Bank recognised that it was well placed to have a voice on older people. It expressed concern in public statements about the needs of older people, acknowledged that countries were doing something where they could and recognised the difficulties that poor countries would face, citing China and India as examples. It is noteworthy that the UNDP and the international financial institutions were specifically named in the 1997 GA Resolution as the organisations that should play lead roles in promoting programmes on ageing (see Section 7.1.3).

Responsibility for implementing the RtD was emphatically placed on the shoulders of individual nations and their governments. As described earlier, the role of the OHCHR in this instance was to provide the conceptual framework for the right to development and to provide guidance to nations on how they should implement that right.

⁶¹ The World Bank produced 'Averting the Old Age Crisis' in 1994, its seminal work on financial security for older people

The recommendations regarding the United Nations system and international organisations (e.g. that the High Commissioner for Human Rights should pursue dialogue with the World Bank, the International Monetary Fund (IMF) and other financial institutions, with a view to their incorporating the principles of the right to development into their policies, programmes and projects) would also be quite germane to this report (OHCHR 1999:16 para 15).

There were no specific instances of how other UN agencies could or should be actively engaged in furthering the RtD

7.4.4 The role of older people in development

Tables 17, 18 and 19 show the frequency of references to old people in comparison to the frequency of references to women and children, across the corpus of documents examined. Because the interests of different population groups often find expression in the development and delivery of dedicated services, the search also recorded one significant service response for each of the population groups: pension arrangements for older people, maternal and maternity services for women, and primary education for children. Detail of the breakdown for the usage of different terms within each category, for example, old, older, aged, women, gender, children and infants can be found in Appendix 4.

The tables are consistent in illustrating the level of interest in older people compared to that of women and children. Of the three sets of reports the WDRs appeared to demonstrate the greatest interest in the lives of an ageing population. The majority of references related to pensions and social protection, indicating the financial and economic interests associated with the World Bank. There was a high point of awareness during the 1990s, reflecting the political economic climate of the time in which there was growing concern about how ageing populations were to be paid for, in concert with the move away from welfarism to individual responsibility. The attention may not have been one of concern about the quality of life and wellbeing of older people, so much as a concern about how ‘today’s’ population would have to pay for them. This lack of interest in the day to day lives of older people was reinforced by a complete absence of reference to them in the year of the 2002 World Summit on Ageing, and to the very few references in the 2004 WDR, which was about services for the poor.

Table 19 Human Development Reports: word frequency for older people, women and children

	Report focus	References to older people	References to women	References to children	Main contexts in which older people mentioned
1982 and 1983	n/a	n/a	n/a	n/a	n/a
1990	Measurement and concept of HD	4	366	255	Vulnerability
1991	Financing HD	8	252	316	Life expectancy
1994	New dimensions of human security	5	114	117	Pensions and social security
1999	Globalisation with a human face	11	256	99	Value of OP as caregivers; cost of care for OP; digital divide
2000	Human rights and HD	5	579	303	As a category in demographic tables i.e. 'aged 65+'
2002	Deepening democracy	9	613	188	1 ref to land rights of elderly widows; 4 x demog. tables; others are part of a list in supplementary notes
2003	MDGs	11	694	474	1 x Poverty; 1x inadequacy of public health care; 6 x demography tables
2007/08	Fighting climate change	23	426	254	4 x heat wave in Paris 2003; insurance; 1 x HIV/AIDS; demographic tables

Table 20 Right to Development Working Group: word frequency for older people, women and children

	Report status	Older people	Women	Children	Main contexts in which older people mentioned
1982 - 1991	n/a	n/a	n/a	n/a	n/a
1994	Working Group (WG)	1	12	6	Implementing HR for everyone including 'the elderly'
1999	Independent Expert	0	4	21	-
2000	Independent Expert	0	21	10	-
2002	Open-ended WG	1	15	8	Discrimination – reference made by an NGO
2003	Open-ended WG	0	10	3	-
2007	Working Group	0	5	1	-

As an aid to analysing the data from the HDRs it is pertinent to recall one of the key elements of human development. The first HDR included the following statement:

The use of life expectancy as one of the principal indicators of human development rests on three considerations: the intrinsic value of longevity, its value in helping people pursue various goals and its association with other characteristics, such as good health and nutrition. The importance of life expectancy relates primarily to the value people attach to living long and well... Life expectancy is thus a proxy measure for several other important variables in human development (UNDP, 1990:11).

This implies that long life is both desirable and that in old age people should be entitled to good health and nutrition. The Report went on to address how economic growth translated - or failed to translate - into human development and how development broadened life choices. Not only was everything here as relevant to older people as to

everyone else, but the attainment of old age was to be seen as an achievement of development. In the context of these statements the paucity of references to older people in the sample of HDRs examined is surprising. The HDRs indicate an almost complete lack of interest in older people or ageing populations.

Older people appear to have also been neglected by the OHCHR in its Working Group on the RtD as demonstrated in Table 20. Although the papers are all short compared to the WDRs and HDRs with fewer references overall to any population grouping, women and children are nonetheless mentioned in each of the different texts. Older people are referred to only once, in 1994, by the Working Group. The RtD Working Group consistently referred to vulnerable groups, without explaining who or what they meant. Unusually the approach taken in relation to these groups, as shown in the following quotation, was to provide them with developmental opportunities rather than ‘care and support’:

Implementing the right to development involves a learning process, an emphasis on human capacities and resources and an empowerment of vulnerable groups such as women, children, minorities and indigenous peoples and the disabled. Improving educational systems and teaching, training and dissemination activities is of crucial importance (OHCHR, 1994:18 para 94).

It is also unusual for older people to be omitted from a listing of those who are vulnerable - but they are absent in the above statement. This could suggest that older people are considered only when virtually destitute and in need of basic sustenance, or are not a group entitled to empowerment and continuing development of their human capacities. Older people were not seen as having a contributory or active role in development, nor were they seen as potential beneficiaries of development. For example, no attention was paid in the 1991 WDR, nor in the 1994 WDR as referred to earlier, to the future infrastructural costs of increasing numbers of older people and the impact this would have on the built environment, public utilities and older person specific services. Likewise in its 2002 report on strengthening markets, older people are not included as a group who could benefit from enhanced structures that would complement ‘existing institutions, human capabilities, and available technologies’ (WDR, 2002). These

examples of exclusion show similar patterns to the data from the landmark events noted in Section 7.3.

Without exception all references to older people in the WDRs and HDRs during the 1990s were in the context of care and income poverty. There were no indications that the term ‘poverty’ referred to anything wider than material poverty or to the consequences of income poverty such as social exclusion. In some instances, older people were also actively excluded from public policies which would be of benefit to them. The following quotation from the 1990 WDR highlights the need to extend public health to those beyond childhood. However, it goes on to exclude those over the age of 60, seemingly on the grounds that do not have economic value.

Adult health is a relatively new issue in public health in developing countries. Most public health efforts in developing countries have emphasised child and infant health. Yet half the population in the developing world is between ages 15 and 60. Children depend on these adults, and so does the economy. More than anybody else, the poor depend on good health to maintain the productivity of their only asset – labour (WDR, 1990:78).

‘Entering the 21st century’, the WDR report for 1999/2000, acknowledged in its introduction that an ageing population would be one of the major issues to confront. It did not comment on whether this included concerns about growing numbers of old people, or whether the demographic transition was the issue. The index for the report contained nine references to ageing, but apart from a single mention of the ‘elderly’ and 13 of pension funds there was virtually nothing about older people in the body of the report. Three mentions were made of ‘intergenerational equity’ in the context of sustainable development.

The turn of the millennium appeared to indicate a change of attitude by the World Bank towards older people. The WDR for 2000/01 dedicated two sections to older people in the chapter ‘Helping the Poor Manage Risk’.

Addressing the needs of the elderly poor thus requires more than pensions. Preventive measures include facilitating saving and investment and providing poverty reduction programs during people’s working lives. Different forms of direct and indirect support are needed for today’s elderly. Programs can provide assistance to families that care for live-in elderly (ibid 2001:152-4).

The above quote is a clear illustration that the 'risks' associated with old age had social as well as economic dimensions, and policies needed to address both' (WDR, 2000/01).

The eight references to 'elderly' people in the 2003 WDR report 'Sustainable Development in a Dynamic World' mostly related to the impact of globalisation on the countries of the South. One was about migrant labour leaving LDCs to provide care services for elderly people in developed countries. A second was about rural women looking after elderly people among their many responsibilities, again because of migration. A third showed how social safety nets were able to support older people in Europe in contrast to what is available to LDCs for vulnerable groups. The two references to 'aging' (sic) (WDR, 2003: pages 4 and 197) both reflected concerns about the economic costs of increasing numbers of older people.

A change of direction in favour of older people was not evident in any of the HDRs around the turn of the century or in the lead-up to the 2002 Summit on Ageing. Of the 11 references to older people in 'Globalisation with a Human Face', the HDR for 1999, the majority were concerned with the costs of care in both financial terms and the added 'burden' on women family members. In its report for the year 2000, 'Human Rights and Human Development', no attention was paid at all to older people. There was a single reference to 'old age' as it appeared in the UDHR, in which old age and others were afforded social welfare protection, and four references to 'aged 65 +' as headings in the demographic tables. This absence was particularly significant in a report with the title 'Human Rights and Human Development'. It could be argued that older people were not seen as being part of the 'human development' project. Statements in earlier HDRs had posited that 'human development' was not to be connected with economic productivity as an end in itself, but with providing the best education and health so that people could earn an income and live better, longer lives. If this were the case that would suggest that people were only developed to be of economic value, which in turn implies that human development stops at a certain age: a point is reached when it is no longer desirable to develop people. In this way the case for active ageing, inclusion and participation are substantially undermined.

By 2007, despite the 2002 Ageing Summit and the MIPAA, no positive mentions of older people were evident in the three sets of texts under examination. The focus was on older people as a potential burden:

The pressure to increase spending on the elderly will likely generate pressures to raise taxes, cut expenditures (including those on children and youth), or both. So, there is no time like the present for investing in the young (WDR, 2007:36).

The introduction to ‘Development and the next generation’, the 2007 WDR, made no mention of how older people could contribute to the lives of younger people, which was unusual given that older people have often been presented as having ‘traditional wisdom’. There was a total of 38 references to older people and related terms. Of the 14 specific references to ‘older people’, only one was obviously concerned with the 65 age group: all references were otherwise offered as comparisons with what younger people do, and not with what older people can offer. The 11 references to ‘intergenerational’ all concerned relationships between younger generations; there was a single reference to grandchildren, although this appeared only in the endnotes (WDR, 2007:229).

Finally, to counter a possible accusation that other WDRs not included in this research may have mentioned older people, a short analysis of the 2004 WDR ‘Making Services Work for Poor People’ is presented (see Box 5).

Box 5 Analysis of 2004 WDR: Making services work for poor people

Older people have been recognised as some of the poorest in society (Harper, 2004, Holzmann and Hinz, 2005) and the title suggested that even if no other WDR mentioned older people, this one surely would. The report however contained only nine references to older people. Four concerned ‘the elderly’ (in a Case study ‘Spotlight’ on Estonia, Box 8.3 on delivery methods of care, and two as part of an assessment tool for seeking the voices of poor people in Table 8.3). Of the three on ‘pensions’ one was a text reference, another appeared in Table 3.3 about the development of pension systems in the West and the last to efficiency savings in public funds. The reference to ‘pensioners’ was in the context of establishing secure financial delivery systems; and the ‘old age’ reference was in relation to whether it is worth investing in girls’ education if they are going to be looking after their elderly parents. In reality only two of the nine references were directly concerned with the interests of older people, the others were all an adjunct to another area of concern.

This particular report was selected because the title might suggest the inclusion of older people, as they are among some of the poorest in the world. There were however only nine references to older people. The report recorded 300 references to child/ren and 62 to woman/en. The term ‘intergenerational’ was mentioned five times in the report: all references concerned future older generations, there was no direct reference to support for older people now.

In summary, the number of references by the three agencies to activities or support directly relating to older people was considerably fewer than those relating to women and children. They were also much more limited in their scope. Older people have been as vulnerable and in need of care and support: or in the words of the World Bank as ‘those who may not be able to help themselves’ (WDR, 1991:39). Support for older people was only looked at in terms of income – there were no mentions of health care or social support, and very few relating to other aspects of wellbeing, such as participation. In contrast, the research demonstrated interest in a wide range of support mechanisms for women and children, particularly in areas of maternal care and primary education (see Appendix 4, Table 1).

7.5 Concluding comments

The CDA has demonstrated an absence of consideration of the interests of older people in the development discourse. Because much of this is evidenced by a silence in the texts examined, the findings require nuanced understanding of the surrounding contexts (Huckin, 2002) and of the life experience of older people. The findings indicate that despite the UN’s many efforts to promote the interests of older people since the 1980s (by the the GAs, Plans of Action, IYOP, for example) scant attention has been paid to older people by the associated agencies and funds of the UN. Women and children were, however, discussed in some depth in the texts, in relation to their immediate and longer term health, and to their education and skills to create a better life for themselves. The discourse on women and development can in particular be seen to have changed over the past 25 years. At the start of the period they too were barely visible in any events or

documents that were not directly concerned with them. By the end of the period they have become part of the mainstream discourse in international development. Some of the reasons for this were discussed in Chapter 4.

The reasons for the continuing poor representation of older people in the discourse were various. They range from opacity in the use of language that obscures the interests of older people; a lack of knowledge about older people which prevents an informed representation of their interests; a normative bio-medical perspective on older people which sidelines them as vulnerable and in need of care; and, leading on from the previous point, a perception that they are irrelevant and have nothing to contribute to forward-looking development programmes.

It must be acknowledged that by their very nature, UN documentation needs to represent and reflect the interests of a very broad sweep of people. Documentation differed in style and level of formality, as demonstrated in the use of personal pronouns, depending on which agency had generated them, reflecting different authors, departmental and organisational cultures. Different cultures, social norms and life expectancies have made a definition of older people difficult and this has perhaps acted as an inhibitor to positive action on the part of UN agencies in the field of ageing. It could be argued that the absence of a definition of older people may have led to confusion in some circumstances. For example the terms 'older labour force' or 'older worker' vary in meaning from one culture to another, and are dependent on different local variables, such as life expectancy. However, in most circumstances the terms were not referring to the UN's definition of 'old', of 60 or 65 plus years of age.

Indications about how to involve or include older people in development policies, plans and programmes were sparse. It is possible that the agencies see themselves as responding to older people through mechanisms which are not overt (Gilbert, 2006). There were, for example, instances in the reports and summit declarations where assumptions could be made that older people were included. However, the terms used were either hiding what was going on, were misrepresenting certain groups of people, or

were providing abstractions so that issues did not have to be dealt with (Byrne, 2008).

The following quotation provides an example of this opaqueness.

We will put into place policies to ensure adequate investment in a sustainable manner in health, clean water and sanitation, housing and education and in the provision of public goods and social safety nets to protect vulnerable and disadvantaged sectors of society (World Summit Outcome, 2005 25b).

The term 'social safety nets', may have been intended to include older people but in the absence of other references to older people in the text, these may be unfulfilled assumptions. Likewise the terms 'household' and 'family' found in many other texts, may be viewed as including older people, but one might speculate whether they are covering up an absence of knowledge about where older people are in a community.

Similarly, there were the 'active omissions' in which the development of services, infrastructure and opportunities were presented in a style which suggested that all members of the community would benefit, and yet in their detail they were clearly targeted to specific groups and were not intended at all for older people. As noted earlier there were no mentions of older people in the MDGs impact targets: all such initiatives' are concerned solely with children. An earlier instance of an 'active omission' was apparent in the 1995 Copenhagen Declaration where, even taking into account the brevity of the text, substantial space was allocated to discussion about preventing and curing communicable diseases (1995 para 22). There here was nothing on chronic illnesses, which has high prevalence among older people (Bennett and Ebrahim, 1995).

Four themes were identified from the analysis of the GA Resolutions and IAPs concerning the condition and status of older people in development. These are that older people are needed (Chakraborty, 2001, HelpAge International, 2003); that older people have needs (Estes, 1999b, Minkler and Cole, 1999, Harper, 2006); that older people have aspirations (Andrews, 1999, Bowling and Dieppe, 2005); and that older people are simply part of society, with no labelling or justification being required for their existence (Fraser and Honneth, 2003). The term 'older people are needed' acknowledges that older people contribute to their communities, but perhaps more importantly, that their input is needed: communities would be diminished without that contribution. This breakdown of

the UN's discourse on global ageing could contribute to understanding and affecting a range of options for policy development and local practice.

The following three chapters explore the implications of the low visibility of older people in the discourse. Through the use of a case study, the research seeks to ascertain whether and how the discourse is reflected in development in practice.

PART IV Research: Case Study

The previous two chapters have investigated the first and second questions posed in this research: whether and how the international development discourse has represented the interests of older people, and how this representation has changed over the last 25 years. Part IV explores the implications of this on development practice. Research questions three and four, highlighted in Table 21, thus seek to investigate how the development discourse has affected practice on the ground in relation to older people. A case study approach was selected to understand and bring to life the relationship between discourse and practice in a real world setting.

Table 21 Research questions: impact of discourse on practice

	Research Question	Planned evidence search
RQ1	How are older people represented in key policy discourses on development?	What the key development theorists, IGOs and INGOs are saying about older people in their reports and conferences.
RQ2	How has the representation of older people changed over the last 25 years?	Evidence of changed language use and incidence of reference to older people by IGOs.
RQ3	How has the representation of older people in the discourse affected grassroots practice?	How organisations talk about what they do, what influences their policy and practice.
RQ4	Are there factors inhibiting the engagement of IGOs and INGOs with older people interests, and if so, what are they?	How older people are referred to, understanding of needs of older people, organisational constraints.

Case studies aim to reveal how and why certain processes, activities and events occur, what the influencing factors are, and, to discern patterns from which lessons may be learned and on which policy and practice responses can be built (Hancock and Algozzine, 2006). Its perceived value in this thesis was to provide a contemporary illustration of the

degree of convergence between the discourse of the international agencies and the practice on the ground. Various sources of information, interviews, observation and written documentation were assembled to explore and analyse the case.

The key aims of the investigation were to:

- a) Explore the knowledge and understanding of the needs of older people by different tiers of agency engaged in the formulation and delivery of social policy and practice in LDCs;
- b) Examine the influence of one agency upon another in developing a local programme, in relation to the impact this may have on older people; and
- c) Identify influencing features and possible levers for change aimed at benefiting older people.

The field research was carried out in West Bengal, India from February to April 2009. Part IV is made up of four chapters. Chapter 8 describes the methodology deployed for the field research. Chapter 9 provides a background on public policy relating to older people in India and West Bengal in order to indicate the level of interest and availability of current support for older people in West Bengal. Chapters 10 and 11 present the findings from the fieldwork.

Chapter 8 Methodology - Case Study in India

Chapter 8 is made up of six sections, composed of the following: (i) the rationale and validity for selecting the case study approach, (ii) the identification of the case study site and research design, (iii) the research tools and how these were used, (iv) the analysis plan (v) the strengths and challenges of the approach taken, and (vi) a summary of the main points from the chapter.

8.1 Rationale and validity for the case study

Case study methodology has been broadly defined as the means for conducting ‘an empirical investigation of a contemporary phenomenon within its natural context using multiple sources of evidence’ (Yin, 1994:13). Different authors give different weight to the importance of the various elements of this. Bryman (2004) and Merriam (1988) have argued that the defining quality of a case study requires the ‘site’ to be the focus of interest in its own right because of what it reveals about the phenomenon and for what it might represent. Others have suggested its defining feature is the use of multiple methods of investigation to gain a rounded and in-depth understanding in a specified context (Robson, 1993, Hancock and Algozzine, 2006). Yin (2003) suggests that it must offer something that is critical, unique or revelatory. These different definitions indicate varying priorities for the use of a case study approach which in turn determine how the site or subject of the case study is framed (Hancock and Algozzine, 2006).

Merriam (1988) argues that there are four main reasons why one may use a case study: to describe, interpret, evaluate or explore a research situation. Case studies are particularly suited to situations in which the behaviour of the people or systems at the centre of the research problem cannot be manipulated (Yin, 1994). By contrast, historical accounts, or descriptions, are best used where there is no scope for control over or insight into contemporary events; and exploration or experimentation requires an ability to control and manipulate events in a direct, precise and systematic fashion.

Critics of the case study method argue that the study of a single or small number of cases can offer no grounds for establishing reliability or generality of findings; others have stated that the intense exposure to a study of the case biases the findings (see Tellis, 1997, Yin, 2003). All of these need to be guarded against by means of considered and systematic use of research tools and self-reflexivity that are together able to establish an observable chain of evidence (Gubrium and Holstein, 2002).

The design of the study must ensure construct validity, internal validity, external validity, and reliability (Robson, 1993). Construct validity requires the researcher to use the correct measures for the concepts being studied. Internal validity demonstrates that certain conditions lead to other conditions and requires the use of multiple pieces of evidence from multiple sources to uncover convergent lines of inquiry. External validity reflects whether or not findings can be generalised beyond the immediate case or cases: the more variations in places, people, and procedures a case study can withstand and still yield the same findings, the greater external validity it has. Stability, accuracy, and precision of measurement all contribute to the reliability of the findings and the analysis. Different strategies were thus used for different elements of the case depending on, among other things, the numbers and range of people involved, the geography, time and cost (Hancock and Algozzine, 2006).

The intention of this case study is to describe and present information in an arena where there has been little research, and to interpret through a process of induction any relationships between the variables. The site itself does not hold particular meaning in this study (Merriam, 1988, Bryman, 2004) but it was necessary that the situation was capable of being replicated and that the circumstances of the case would be recognisable in similar situations to produce a story that would be familiar, if not identical (Robson, 1993). The dominant approach of this case study was thus to use multiple tools that would make it possible to investigate the pattern of relationships between different agencies in a given location (Yin, 1994).

8.2 Identification of case study and research design

As the focus of the research was to illustrate how the international development discourse impacts on local practice in relation to older people, the geographical scope for selection of a site was extensive. India was selected for a number of reasons. From the academic and learning perspective, India represents many of the challenges in international development today— rapid economic growth, extreme poverty, a growing middle class, increasing life expectancy and a growing influence on the world stage (Dyson et al., 2004). From the ageing perspective, the country is well advanced in the demographic transition and is, arguably, at a level of economic development at which the government could provide a viable old age pension (Lloyd-Sherlock, 2010). In terms of social policy, India has a National Policy on Older Persons (Government of India, 1999) and an active civil society, while West Bengal has traditionally been a politically progressive state with a well-documented commitment to equality and practice of addressing issues of marginalisation (GoWB, 2004). Both India and Kolkata (the state capital of West Bengal) were also familiar territory to the researcher. After nearly thirty years association with the country, starting with a field visit with Oxfam in 1978, and many visits thereafter, the author was familiar with the culture, politics and day-to-day practicalities of living there, combined with ready access to resources and networks. India per se was not however the subject of the case study. The policies and practices of the governments of India and West Bengal were not under investigation, though a review of their respective key policies was undertaken to provide a context for the case study.

The intention was to explore how a generic development programme, as opposed to an age specific programme, addressed the interests of older people. It was thus necessary to identify a case study that presented itself as working with all sectors of the community, rather than with a single group or on a single issue. It had to represent a situation that would be familiar to development ambitions elsewhere in LDCs, and it had to be achievable in the time available. Box 6 below summarises the key parameters for the case study.

Box 6 Parameters for case study

From discourse to practice: parameters for case study

- a) The case study should exhibit engagement at different tiers of agency, from an international development body to a community based-organisation
- b) The project programme must be concerned with broad-based development rather than a single issue focus, such as health
- c) The programme or project under examination must be deemed by those involved in it to be of relevance to all groups in society, regardless of age, gender, ability or minority status
- d) The case has to contain features from which lessons can be drawn that could apply to other development situations
- e) That the study is achievable in the time made available to the project.

An initial search was made using the internet and personal contacts to identify appropriate organisations working in West Bengal. As the only international development agency working with and on behalf of older people world-wide, discussions were held with senior staff at HelpAge International (HAI) in London, for their assessment of INGO and IGO support for older people in India. In consequence of these early contacts and the information gained during the desk research a project emerged which allowed a detailed case study approach to be taken. Using a detailed example would make it possible to gain a 360 degrees picture of a single situation, to identify if and where the points of pressure were in the discourse and where the ‘tipping’ points into practice came.

The project identified for the case study was the West Bengal Civil Society Support Programme (WBCSSP). It was identified on the Civicus⁶² website as part of a programme of work in India by The Society for Participatory Research in Asia (PRIA). PRIA is a leading civil society organisation in India engaged in developing participative governance. It is a national NGO based in Delhi, working internationally, regionally,

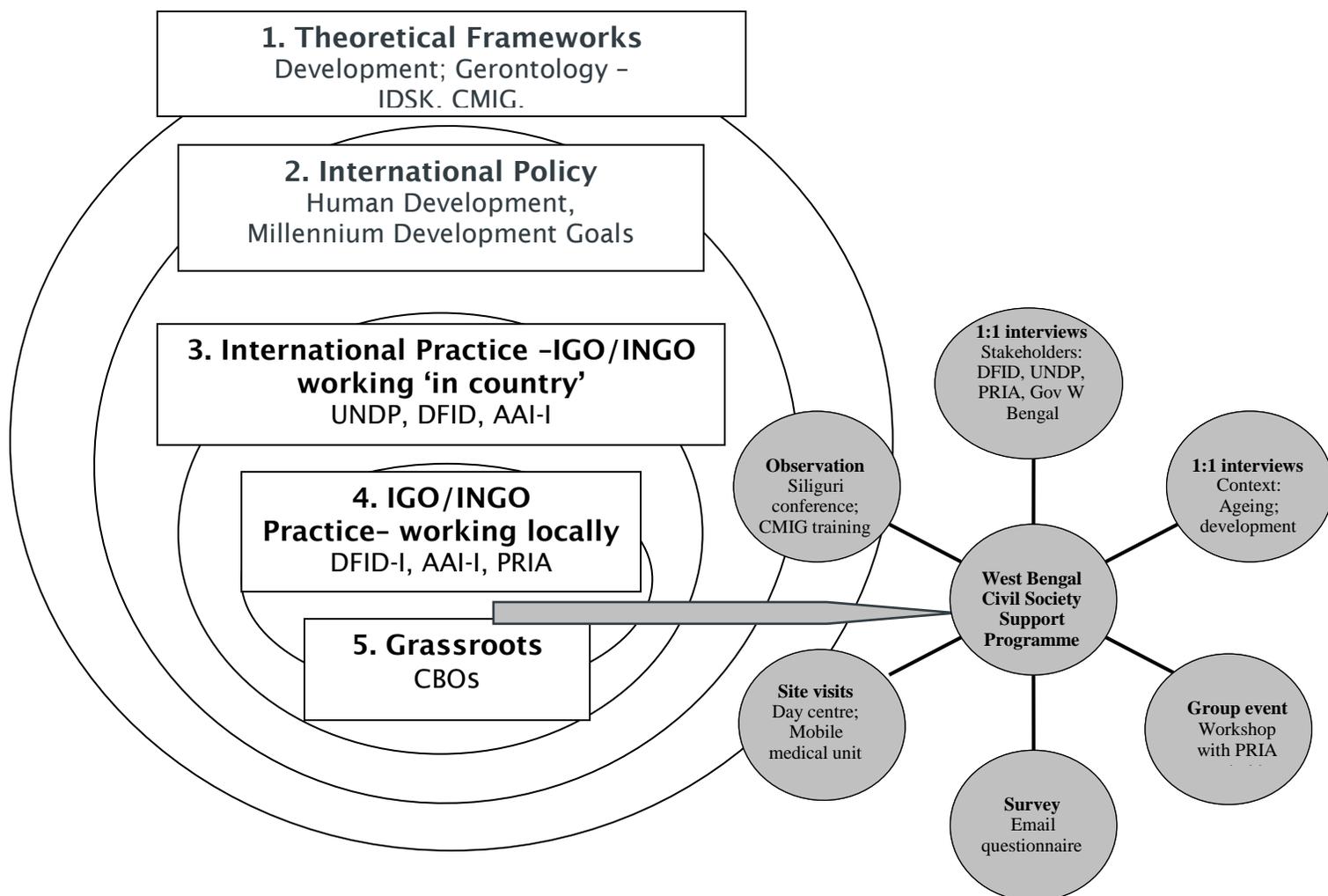
⁶² Civicus *World Alliance for Citizen Participation* is an international alliance of civil society organisations working at the local, national, regional and international levels. Source www.civicus.org accessed 13 May 2010

nationally and locally, and is the implementing partner of the WBCSSP. The WBCSSP is a bi-lateral programme between DIFD and the Government of India to promote and develop civil society in West Bengal. Devised and funded by DFID its aim was to enhance civil society's role in achieving pro-poor development. It would do this by supporting the efforts of civil society to become more accountable, and by building its capacity to influence government policies and practices to ensure better access to quality services by the poor. The overarching aims were to improve governance, increase the engagement of marginalised groups and promote the rights of individuals and communities through the development of, and support to, community based organisations (CBOs) as a route towards eliminating poverty. Its concern was with wider approaches to understanding and addressing poverty, including issues of social inclusion and participation (Green, 2002, Chambers, 2004, Saith, 2007a). It was engaged with processes for change rather than meeting the needs of particular social groups, and focused on the promotion of civil society overall rather than a single issue or service. Crucially the researcher also had access to interviewees and documentation for the project from its conception through to its implementation. The WBCSSP thus fully met the parameters defined above (see Box 6).

The right-hand side of the Conceptual Framework (Figure 1, page 19), presented in the Introduction to this thesis can now be fleshed out, see Figure 4 below. The concentric circles indicate the tiers of influence between a global discourse and the realisation of a local project (Grindle and Thomas, 1991, Pereira, 2002, Seshia and Scoones, 2003). The levels included a global governmental agency (UNDP), a government bi-lateral funder (DFID), an Indian-based NGO (PRIA) and grassroots organisations (CBOs in West Bengal). These were framed within the broader contexts of development and ageing in India and informed through interviews with both academics and practitioners in the disciplines of development and gerontology; and with an international NGO working across India, though not directly involved in the case study. Each tier or concentric circle suggested to the researcher other relevant organisations for investigation beyond the immediate stakeholders. Three groupings were identified to provide the required data for the research. The first two are what Green (2002) defines as primary and secondary

stakeholders. Primary are those whom a project seeks to benefit, either directly or indirectly, namely the grassroots organisations in this study. The secondary stakeholders are those with a specific role in project implementation: DFID-I, the Government of West Bengal and PRIA.

Figure 4 Case study: research framework –showing activities undertaken



AAI-I = Action Aid International-India
 CBOs = Community-based organisations
 CMIG = Calcutta Metropolitan Institute of Gerontology
 DFID-I = Department for International Development - India
 IDSK = Institute of Development Studies, Kolkata
 PRIA = Participatory Research in Asia
 UNDP = United Nations Development Programme

The perspectives of a third group of actors was sought to provide the wider context on development and ageing and contribute additional insights into the connections between the global discourse and local practice. This third group comprised UNDP, AAI, HAI, CMIG, two India-based development studies academics.

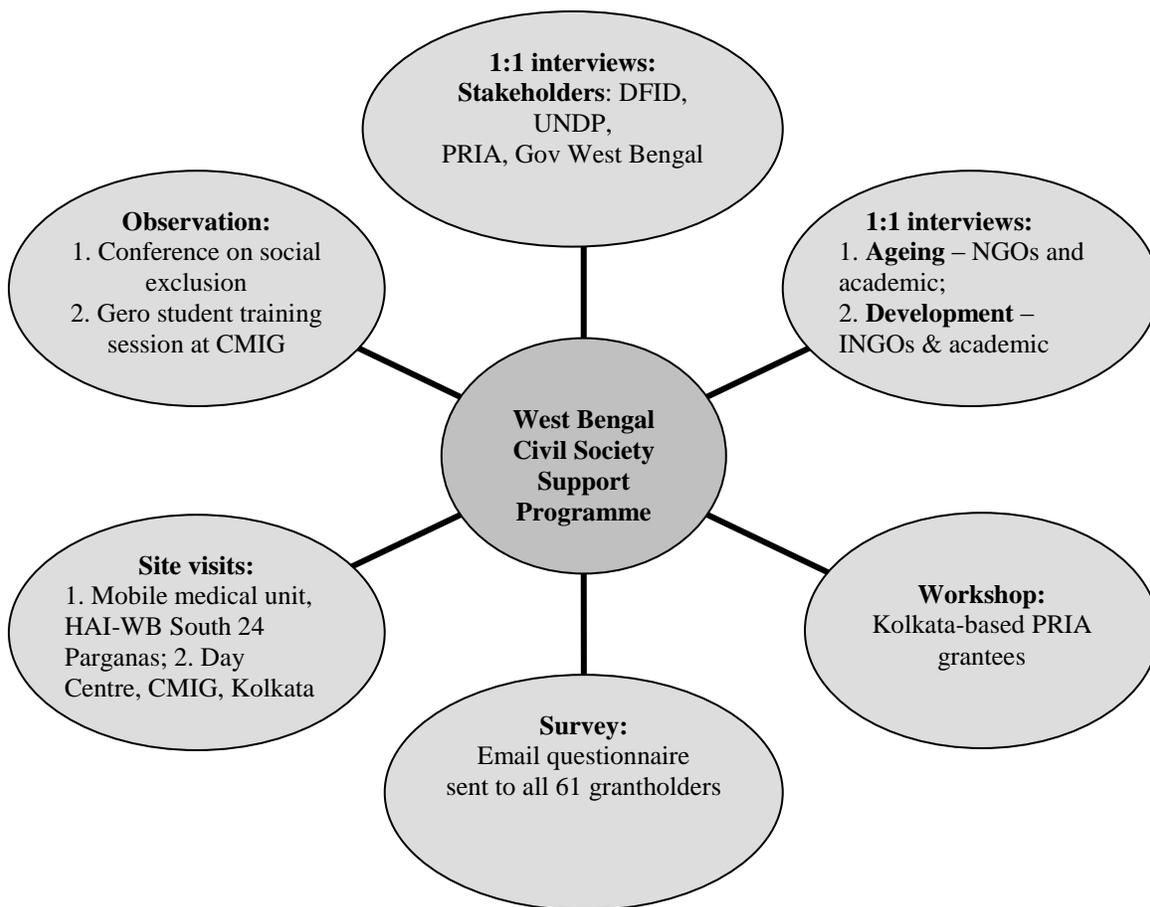
The views of policymakers and practitioners at different levels of hierarchy in the IGOs and INGOs, were sought in acknowledgement that public officials at all levels in a hierarchy play a role in shaping and influencing policy and institutional change though may also be bound by these institutional structures and practices (Grindle and Thomas, 1991, Seshia and Scoones, 2003).

8.3 Research tools

In order to acquire the multi-perspectival analysis of this case a range of different instruments and activities was used to gather the data for the case study (Yin, 1994). These are demonstrated on the right hand side of Figure 4 above, and expanded upon in Figure 5 below.

The tools used for investigation in the case involved direct engagement with the project participants through face-to-face interviews, a survey using an email questionnaire, and a consultation workshop to gather primary data; and observation and engagement with connected actors who were not directly involved in the case. To gain a broader picture of development policy and practice for older people in India supporting documentation from all the organisations interviewed was gathered and examined, including Government of India policies and data on services available for older people in India. Additional information was sought from two international NGOs working in India that were not connected to the case study, and from academics in the fields of ageing and development in India. The following sections detail the reasons for the selection of the particular tools used and how they were applied to this case study.

Figure 5 Summary of methods and instruments deployed in case study



HAI-WB = HelpAge India – West Bengal

Different research strategies and instruments were deployed for the different stakeholders involved in the case, depending on the size of the stakeholder group, the ability to access them, and the willingness and availability of the stakeholders (Johnson, 2002). The 61 grassroots projects/grantholders who were the targeted beneficiaries of WBCSSP constituted the largest group of direct stakeholders in the programme, thus several methods for engaging with them were deployed. In order to gain as much information from as many of them as possible in the time available, they were asked to participate in a self-administered survey and a consultation workshop. Semi-structured interviews were also held with two project holders, who had been identified by the WBCSSP office in Kolkata as having an active interest in the changing circumstances of older people. Both also completed the survey and attended the workshop.

Table 22 Response rate of WBCSSP grantholders to questionnaire and workshop

Engagement method	Nos. sent/invited	Response rate: nos. received or attended	Response rate: % received or attended	Comment
Questionnaires	61	14	23%	13 replied by email 1 brought the completed form to the workshop
Workshop	26	15	58%	7 attendees had completed the questionnaires

Altogether direct engagement was made with 23 of the 61 project holders (see Table 22).

8.3.1 Questionnaire survey

While data gathered from case studies is primarily qualitative it is sometimes useful, if possible, to include some quantitative data to gain an assessment of the scale of a project (Robson, 1993). In this case it was helpful to acquire a picture of the extent of engagement with older people in the project as a whole. A self-administered survey was thus developed. These have the practical advantages of being effective and inexpensive way of reaching a wide audience that is geographically dispersed (Robson, 1993). Two common problems which arise are (i) the response rate can be low, and (ii) the questions may be misunderstood and the answers ambiguous. As the information being sought is for qualitative rather than statistical purposes it has been suggested that a minimum response rate of 20% is acceptable; and piloting the questionnaire is advised in order to minimise the scope for misunderstandings (Bryman, 2004).

In March 2009 an email survey was sent by the researcher to all 61 grantholders (see Appendix 5). Its aim was two-fold: to learn directly from the grantees whether their existing work programmes had any direct or indirect impact on older people in their respective communities; and to determine the grantees' level of awareness of the circumstances of older people in those communities. The number was too large to interview by telephone or in person and too small for random sampling. As the

grantholders were based throughout West Bengal, and all had access to the internet with their own email addresses, an email survey was the most efficient way of reaching them. The advantage of email over the postal service was that it allowed for an immediacy of response, for a ready dialogue between the researcher and interviewee and was cheap (Selwyn and Robson, 1998). The researcher drafted the survey form and covering letters having sought guidance from the Kolkata staff team at PRIA on the style and tone. The questionnaire was piloted with the PRIA staff to refine both the content and the procedures to be followed (Robson, 1993). They suggested a few changes of style which were incorporated. It was agreed that English would be the appropriate language to use. This had the added benefit for the researcher of being able to make use of the data directly, without the intermediary of a translator or interpreter with whom an understanding would need to have been reached about the style, type, process and quality of translation (Taplin, 2008). Respondents were offered the option of remaining anonymous. On the advice of the WBCSSP, staff respondents were given two weeks to return their completed forms direct to the researcher by either email or post. Four respondents sought clarification of the questions, which were provided to them by email.

8.3.2 Consultation workshop

At the same time as seeking permission from PRIA to conduct the survey, a discussion was held about arranging a workshop with the programme's grantholders. A group discussion would produce new data and yield different perspectives on the relative importance of different issues that arose from the programme (Hancock and Algozzine, 2006). As part of their support and training programme for its grantholders PRIA was interested to raise awareness about older people among its grantees and to explore ways of supporting and engaging with them in Civil Society. The workshops thus provided a dual function of gathering more data, and offering a developmental opportunity for the grantholders.

The researcher was able to cover the costs of the event, including lunch and all administrative expenses so that it would be cost free to PRIA and the participants. PRIA agreed to organise the logistics and provide all the administrative back up, including emailing their groups, copying papers and arranging the venue and refreshments. As

attendance would have involved two days' travel for some of the grantholders PRIA's Director for West Bengal advised, on the grounds of practicality and cost, that only Kolkata-based organisations be invited. The researcher further discussed with PRIA Kolkata whether it would be necessary to inform any of the programme's key stakeholders of the event, specifically DFID, the Government of West Bengal and PRIA head office. The Kolkata office concurred that only the Director of Operations at PRIA in Delhi needed to be informed of the event. A half-day session for the Kolkata-based WBCSSP Project holders was thus arranged for 7 April 2009, to be held at the Calcutta Samaritans.

The workshop took the format of a two and a half hour morning session, followed by a full lunch during which there was time for further networking. The day was introduced by the Programme Manager who highlighted that PRIA was interested in pursuing this subject as one it had not previously looked at. The researcher outlined the purpose of the event and referred participants to the three papers she had prepared beforehand and circulated for the meeting: a project briefing outlining the research (Appendix 6), and two information handouts: one giving the larger picture of global ageing, the other providing data about benefits available for older people living in West Bengal (see Appendix 12).

Participants were invited to introduce themselves, giving their name, organisation, and project, to state briefly what, if anything, their project was doing for old people, and to say how they felt older people were faring in their respective communities. The researcher then facilitated a discussion. This sought to cover participants' view of: (i) different ways in which older people could be included or could benefit from their respective WBCSSP projects, (ii) how they thought older people could have contributed to the organisation and the WBCSSP project in particular, and (iii) what would enable their organisations to be inclusive of older people. The discussion was very full and it was not possible in the time available to explore the last point in great detail. The meeting was recorded in three ways: a tape recorder was placed in the middle of the room; two members of staff from the Kolkata office took notes; and the researcher also took notes. Participants were asked at the start of the workshop and made no objection to

having the meeting taped. The researcher had been reassured prior to the workshop that it would not be necessary to have an interpreter present.

The researcher produced a report of the event in June 2009 (see Appendix 12). All quotes were anonymised. The staff team at the PRIA office in Kolkata was invited to comment on the report for accuracy and sensitivities before the researcher circulated it to the workshop participants. There were no comments to the text and the report was duly circulated by email, with an accompanying note from the researcher inviting feedback on this or any other aspects of work with older people. Again no further comments were received.

8.3.3 Interviews

Individual interviews were carried out with a range of stakeholders to gain a greater depth of knowledge and understanding of the theoretical underpinning of the WBCSSP (Johnson, 2002, Mason, 2002). Unlike the questionnaire survey the aim was not to generate figures which could be used to 'speak for' a whole community but to gain insight into how the issue might fit within the broader context of development (Bryman, 2004). Interviewing also allowed the opportunity to follow different directions which may not have been thought of when putting together a survey. Studies tend to favour face-to-face interviews over phone interviews in qualitative research because they provide a contextual naturalness of response and setting leading to more open expression and nonverbal communication. They also allow for greater effectiveness in working with hearing-impaired respondents, for dealing with complex issues; or where there may be difficulties in understanding language (Shuy, 2002). The main inhibitors to conducting face-to-face interviews are time, geography, and the number of people to be interviewed (Robson, 1993, Bryman, 2004). Longhurst (2003) has suggested that because of the amount of time involved in interviewing, sample sizes tend to be smaller than a survey, usually around 12-20. There is no definitive answer given on what is the right number. Johnson's (2002) response to this is 'enough...so that the interviewer feels he or she has learned all there is to be learned from the interviews' (Johnson, 2002:113).

A semi-structured interview format using open-ended questions is recommended for qualitative research (Robson, 1993, Johnson, 2002, Bryman, 2004). This leaves the interviewer flexibility to explore, probe and ask further questions and to respond to areas raised by the interviewees. An interview guide is prepared with a basic list of questions to ensure that all relevant topics are covered, to give consistency across the interviews, and to ensure the same areas are covered (Johnson, 2002). Flexibility is also important for the informants as it provides scope for them to raise and express concerns from their own perspective rather than respond only to those identified by the interviewer.

The case study design broadly prescribed the range of interviews that would be required. Nineteen interviews were carried out, ensuring between them that they represented the disciplines and different levels of agency and required by the study: from theory to policy and practice, and from grassroots through national and international (as indicated in Figure 4): Interviews were thus held with policymakers, service providers, advocates and academics to place the case study in a broader context, the originators of the project, the funders, the project management team and the beneficiaries of the project, that is the grantholders. The final selection of interviewees was attained through a combination of desk research before and during the field visit; personal contacts, snowballing and opportunistic endeavour through attendance at a conference in West Bengal and public lectures at the Centre for Studies of Social Science, Kolkata.⁶³ Appendix 7 provides a list of the interviewees, their role, organisation and the interview date. A basic topic guide was developed. It contained common questions for all interviewees but recognised differences between project-based bodies and government and academic institutions, and was thus slightly adapted for use with these two audiences. See Appendix 8 parts I and II.

Where possible and appropriate interviews were held with staff at both the national office (all Delhi-based) and the state-based office or branch of the organisation involved in the project (all Kolkata-based). The purpose of this was to identify the levels of consistency of discourse within an organisation and whether or how the discourse changed as it

⁶³ <http://www.cssscal.org/>

moved from the policy-making arena to programme development and implementation. It was possible to do this with UNDP, DFID, PRIA, HAI and ActionAid, all of whom had programmes in Kolkata. UNDP was selected as the inter-government body for interview as it is the lead UN agency on development in India and is providing support in West Bengal for the development and improvement of State planning and governance. Within the WBCSSP project itself interviews were held with senior staff in DFID, PRIA and two of the grantholders.

The researcher was also given access to other staff in the organisations where specialist knowledge was needed, for example to the staff member responsible for maintaining the monitoring information in the office of WBCSSP in Kolkata, and the librarian at the PRIA Head Offices in Delhi. Other contextual interviews were held with the Institute of Development Studies Kolkata (IDSK) and the Calcutta Metropolitan Institute of Gerontology (CMIG) to provide perspectives from the fields of development and in ageing. Two additional interviews were held with senior officials in the GoWB Planning and Development and Social Welfare Departments to learn more about the services and support available for older people in West Bengal.

Interviews were held with key informants outside of the immediate project in order to gain a rounded picture of where 'old age' fits into the discourse and how it is perceived by other partners engaged in the implementation of development programmes.

Interviews were thus held with senior staff at Action Aid India and HelpAge India.

Action Aid India (AAI) is a global NGO with a substantial presence in India and one of the very few global 'non-age' INGOs to include ageing in its mission statement.

HelpAge India (HAI) is a long-standing INGO working with older people in India (since 1978) and is both a provider of services and a national advocate for older people. An additional interest in interviewing representatives of HAI-I was to gain their perspective of the circumstances facing older people in India today, what changes they had seen over the last 25 years and what they would hope or expect to see happening for older people in India. An understanding of their relationship with other aid agencies and UN agencies was also sought, to gain an insight into how they perceived their value in the

development field. Contact was initially made with the CEO of HelpAge India at their national office in New Delhi, who then referred the researcher to the Director of the programme in West Bengal.

All of the international government and non-government agencies were initially contacted by email, some before the researcher arrived in India, seeking a meeting and attaching details of the project. Meeting dates were arranged by telephone in Kolkata. West Bengal government departments were all contacted by phone in the first instance. This was to enable the researcher to reach the correct person in the relevant government department by being able to explain in person what was being sought. The participants for interview were strategically identified as being the person with the most relevant experience in the field of the research (Johnson, 2002). The interviewees were all at the necessary levels for the research – as directors or senior managers with influence over the policies and practices of their respective organisations, or academics with an appreciation of the interface between ageing and development. They had clear knowledge of the social and political environment in which they were working (Pereira, 2002).

The interviews were designed to explore how the different organisations regarded older people and responded; how their organisation systems were designed to represent the interests or otherwise of older people; to identify what was available for older people as citizens in society (as distinct from viewing older people as beneficiaries), and to identify where responsibility for older people, as individuals and as a group, lay in society. In addition the researcher sought to identify attitudes to older people and the status afforded to them in relation to other marginalised groups, including women, in society. A schedule of questions was prepared, which were clustered into researchable sub-questions and allowed the interviews to unfold in a conversational manner, allowing participants the chance to explore issues that were also of importance to them in the context (Longhurst, 2003). At the start of each interview informants were invited to read through and ask questions of the consent form (Appendix 9), which they were then invited to sign. There were two instances when it was not appropriate to use the form: one was an informal discussion in the private home of an informant and the other was with a senior

government official who was very pressed for time. All interviews with organisation employees were held at the offices of the interviewees. One interview was held at a neutral meeting place as the interviewee was an independent consultant whose place of work was his home and another at the private home of an the informant mentioned above.

Through perseverance it was possible to carry out all the interviews as planned with the organisations originally identified for engagement with this research. To avoid the possibility of substantial gaps in the data required (Silverman, 2005) alternative contacts were explored, in case any of the first choice organisations were unable to accommodate the research requirements. While it was sometimes difficult to reach people everyone presented themselves as willing participants and were in the main generous with their time. In recognition of the need to balance the requirements of the research with the demand on people's time the interviews tended to last between one and one and a half hours (Robson, 1993). Where possible interviews were recorded on tape and supported by detailed handwritten notes. They were later transcribed and analysed in order to draw out shared themes or experiences, or to identify where things were experienced differently by different groups of individuals, such as government and non-government agencies.

8.3.4 Secondary data collection

A range of documents was examined from each of the agencies interviewed. The research objectives of this documentary analysis were to establish whether issues concerning older people were evident in the activities of the organisations generally, and if so, how they were represented. Documents included their annual reports, key publicity leaflets for use by the general public and, where available, samples of their regular newsletters. The review of Indian government policies of direct relevance to older people was undertaken to provide a broader context for the study, to ascertain the government's awareness of the needs and interests of older persons and to gauge the level of its commitment to meeting these needs by looking at government programmes for older people. It included India's 1949 Constitution, the national Five Year Plan for 2007-2012, the National Policy on Older Persons, annual statistics from the Government of West Bengal (GoWB) and the GoWB's 2005-2006 Annual Plan of Action, for implementation

by various ministries and departments concerned with the welfare of older persons. The policies were sourced from the internet, from government departments in West Bengal and from the libraries at the Institute of Development Studies Kolkata and the Centre for Studies of Social Studies Kolkata. Appendix 10 lists the documents reviewed.

8.3.5 Other events and activities

The researcher attended several events beyond the immediate remit of the WBCSSP to gain a fuller picture of issues affecting older people in India. As a participant at a two-day conference on Social Exclusion organised by PRIA in Siliguri, West Bengal in February 2009, the researcher attended eight sessions including a presentation on ageing⁶⁴ and another on an India-wide DFID programme of support to civil society.⁶⁵ This resulted in two further contacts which were followed up in New Delhi in March 2009: one with DFID-I, and the other with an academic in development economics.⁶⁶ In Kolkata the researcher attended a training event at CMIG, at the invitation of their Director, for a group of gerontology diploma students on a field trip from Delhi. The researcher held an informal question and answer session with them, to gain more examples about the circumstances of older people and where responsibility lay for their wellbeing. Although first-hand experience of the lives of older people was not the remit of this study, two site visits were made: one to CMIG's day centre for older people, the other to accompany HAI's Mobile Medical Unit to a village on the southern outskirts of Kolkata.

A reflective field diary was kept to record changing thinking and perspectives on what was happening in the field, as well as recording new references and contacts (Mason, 2002).

⁶⁴ Presentation: *Phenomenon of aging citizens of the globe: challenges and opportunities of bio-technology for a better health care system* Dr Ranadhir Chakraborty: University of North Bengal 19 February 2009

⁶⁵ Presentation: *Strengthening Civil Society to Promote Inclusive Governance: lessons from DFID's Poorest Areas Civil Society Programme* Dr Arundhuti Roy Choudhury, Social Development Advisor, DFID, New Delhi 19 Feb. 2009

⁶⁶ K.R.G. Nair, formerly Professor of Business Economics, University of Delhi, presently Honorary Research Professor at the Centre for Policy Research, New Delhi.

8.4 Analysis process

The first step was to decide how to store the data, so that it could be readily accessible and useable. The computer-assisted qualitative data analysis software, MAXQDA, referred to in Chapter 6, was used. All the interviews were recorded in one project file, and the printed documents stored in another. These latter were divided into two categories: publicly available policy papers, such as an organisation's annual report, and government policies on older people; and the papers and documentation produced specifically for and under the auspices of the WBCSSP, the project at the heart of the case study. Storing them in MAXQDA made it possible to perform word frequency and key word in context searches and to cross reference texts (Fairclough, 1995).

Analysis of the data was an iterative process, reviewing and building on the data as it was gathered from the interviews and the survey during the ten weeks field research in India. At each stage the raw data gathered was recorded and reflected upon. This allowed for preliminary analysis and for identification of gaps requiring additional evidence (Robson, 1993). The timetable had allowed for follow-up phone calls, emails and interviews to seek clarification and further information; and to pursue new contacts recommended by the interviewees. Several phone calls and emails were made with the first round of informants. New interviews were arranged with local government officers in West Bengal, on the recommendation of the informants, to gather more detailed knowledge of support for older people in the State. Background information was collected from all sources to provide a context in which to understand the situation of each organisation that was interviewed. The data from the interviews were treated with equal reliability, as all interviewees identified were, in the context of the case study, experts in their respective fields.

A thematic approach to the analysis was taken (Robson, 1993, Mason, 2002, Bryman, 2004), which reflected primarily on perspectives of how older people were viewed in society and in the programme. The data analysis of the case study was also informed by the literature on linkages between global discourse and local practice, and the findings

from the discourse analysis presented in Chapter 7. For example, the discourse analysis had demonstrated an emphasis on the place of women and children in development and this was an awareness the researcher brought to the interviews. Analysis of the instruments of policy used to inform development in practice had also suggested that where older people were visible in development, their roles could be categorised as being needed, in need, aspirational or 'being there' (refer Section 7.2.4).

The analysis is presented through the use of examples given and quotes from interviewees and participants at the workshop to bring the case 'to life'. Four of the interviewees were willing to be identified in any final report, provided they could see their quotations before publication.

8.5 Strengths and challenges of the field research

The significant strength of a case study approach as a research method is that it provides the opportunity to explore *how* and *why* things happened, to attain knowledge and understanding that reaches beyond the historical (Yin, 2003). The significant challenge is to demonstrate a particular phenomenon through a single example (Silverman, 2005). These features are both addressed below, along with a brief review of the respective strengths and challenges in the use of the different tools in this particular study.

8.5.1 Strengths

The case study approach made it possible to gather in-depth first hand qualitative data that has added richness to the study that would otherwise have been unattainable. The range of detailed examples given by the multi-methods approach used in this study was both liberating and stimulating, providing the scope for opening up and following further routes of investigation. These included following up a lead from the Siliguri Social Exclusion Conference (referred to earlier in Section 8.3.5) to meet a retired academic of development studies in New Delhi, and effecting an early introduction with DFID, which provided an entry to the later more formal interviews. This very transparency also presented challenges which are commented on in Section 8.5.2. Reflexivity was a key

part of the interview practice and the researcher's own knowledge and experience of working with older people helped build a confidence with the interviewees (Atkinson and Coffey, 2002, Silverman, 2005).

The study was not in a position to exert 'control over events' (Yin 2003), although there was the possibility of unintended benefits in terms of the research itself, resulting from discussions, the workshop and the email survey. For example, the research process provided a means of raising awareness of the issues among those who were in a position to influence the circumstances of older people, so that they in turn could encourage the inclusion of older people in future civil society pro-poverty programmes. A few of the interviewees expressed an active interest in what they could do to change their practices in relation to older people, an outcome that would probably have been difficult to achieve had contact been solely by questionnaire or by telephone interview.

The benefits of maintaining a diary during the field research meant that events were recorded at the time, removed the possibility of forgetting important aspects of the event, and made it possible to build a bank of thoughts and changing perspectives on the data for use later on with the analysis and writing up of the findings.

8.5.2 Challenges

The challenges fell broadly into two parts. The first was concerned with identifying the case study and the mechanics of carrying out the research. The second was how I sought to investigate the relationship between the global discourse and local practice.

Selecting a 'case' for this thesis was to acknowledge that while it could not represent all development programmes, its 'story' or parameters (see Box 6), it should be sufficiently familiar to allow generalisations to be drawn (Fennell et al., 1988). The circumstances to be studied had also to have a clarity that transcended the 'site' and could be found elsewhere (Seale, 1999). The openness of the researcher's approach could have brought its own weaknesses (Robson, 1993): talking to too many people, engaging with informants who may not be at the right level for the study, for example being either too high or too low in the organisation structure, or too specialised or personal in their remit

or interest. A number of the tools used, such as interviewing, observation and surveys are open to accusations of researcher bias and subjectivity that have the potential to interfere with independent objective analysis (Peshkin, 1988). There was some concern that gathering data from a variety of sources could present challenges in analysing the data systematically. Using semi-structured interviews for example yielded different information as it matched different circumstances and individuals in order to collect the data (Hancock and Algozzine, 2006). The wide range of people with whom contact was made could also have resulted in a diverse set of data from which it would have been difficult to draw generalised conclusions (Warren, 2002). The researcher sought to guard against these through careful selection of informants and the use of the topic guide for the interviews.

Aware that ‘no method of research can stand outside the cultural and material world’ (Silverman, 1997: 249), there was a possibility that the researcher, a white woman from a developed country, could be perceived by the interviewees as having access to resources or contacts of use to the programme. A consequence of this would have been ‘courtesy bias’ or ‘respondent acquiescence’ by the respondents to the interviews and questions (Robson, 1993). Equally the informant brings his or her own perspective that is both personal and influenced by the position they hold in their respective organisation (DiMaggio and Powell, 1983). It is not possible to assess the degree to which these factors may have influenced the outcomes but the interviews were of sufficient length and openness to suggest that the researcher’s position had not had a significant impact on the outcomes. Carrying out the interviews at the respective workplaces of the interviewees gave the researcher insight into the circumstances of the different parts of the project and the opportunity to gather artefacts (such as leaflets). Working within their own context may also have made the balance of power more equal between the interviewer/respondent relationship, in a situation where the interviewer is usually seen as controlling the process (Gubrium and Holstein, 2002, Warren, 2002).

Reaching a wide enough range of bodies to reflect the many intermediary stages and the extensive contextual factors that influence the stages between a global discourse and local

practice was a substantial challenge, especially in the time available. Engaging with staff at the national and state-based office or branch of each organisation enriched the evidence gathered about the translation and transference of ideas and responsibility from one tier to another in the global/local discourse. This approach was a helpful deviation for this study, from engaging with bodies who are all working at the same level, whether that's national, regional or local, as is sometimes the case in such studies (Gilbert and Gilbert, 2004, Jones et al., 2012).

Consideration was given to interviewing older people about their perception of their needs and whether they were aware of the particular WBCSSP project taking place in their community. This information was not essential to this particular study which was limited to exploring the impact of the development discourse on the practice of organisations. However, the concomitant impact of this on potential beneficiaries could be an area for future research. Because of the researcher's contacts no practical difficulties were encountered and it was possible to meet everyone necessary for the study.

8.6 Ethical considerations

The Research Ethics Committee of the School of Social Sciences at the University of Southampton reviewed and approved the application for this study on 17 November 2008. The key issues of concern were to maintain impartiality, integrity and independence (Yin, 2003, Bryman, 2004). The snowballing means of alighting on the 'case study' provided a measure of independence, as none of the key stakeholders or interviewees was known to the researcher prior to the interviews. Providing pre-interview project information and seeking informed consent guarded against misinformation and deception (Robson, 1993).

Having identified the relevant agencies, the researcher sought in the first instance to engage with senior people in those organisations to gain acceptance of the research to be carried out. These approaches were made first to the national or regional headquarters of the respective organisation, whereupon acceptance was also sought to interview local

staff and to gain access to local projects. Guidance was sought on who to talk to locally in their projects, with a view to their 'opening doors' for the researcher. A substantial part of the buy-in was concerned with enabling the research to be of practical use for the agencies involved, primarily offering each the opportunity for feedback, as well as a short report which would include guidance on the integration of older people for future projects. Special attention was paid to protecting the interests of the organisations who were interviewed (Gubrium and Holstein, 2002). All those who showed an interest in taking part were sent an information sheet by email, outlining the study, the expectations of their participation, their rights, and how issues of confidentiality and anonymity were to be addressed (Robson, 1993). Because the pool of organisations was small, and the number of interviewees from each very few, it might be possible that organisations and the individual taking part could be recognisable to a reader. It was therefore necessary to obtain the consent of the organisation itself to take part in the research study, as well as of the individuals. Senior representatives of the organisations taking part in the research were asked how best they would like the confidentiality of their organisation to be protected. Where an individual had a unique role in an organisation that would allow for identification, specific permission was sought from that participant. At the start of each interview the researcher described the purpose of the research, again offering the participant an opportunity to ask any questions for clarification and presenting them with the consent form. By signing the consent form the participants confirmed that they had read and understood the information sheet, had asked and had any questions answered, knew that they could withdraw their participation at any time without penalty and had agreed to the interviews being tape recorded and to the use of anonymised quotes (Robson, 1993).

Concerns relating to language and cultural difficulties did not emerge: English was the working language for all national documentation and was the acceptable spoken language for all key stakeholders. Bengali was the preferred language for a number of participants at the workshop, but was managed for the researcher through other participants offering to translate.

8.7 Concluding comments

The inclusion of a qualitative case study in this research was to allow for in-depth focus on a particular situation or phenomenon through an empirical investigation. Reviewing a contemporary phenomenon within a real life context by use of multiple sources of evidence was viewed as being of help in illuminating the existence of previously unseen linkages in the project itself, the literature and the content analysis (Robson, 1993).

Although the case study approach can sometimes be accused of non-typicality (Fennell, 1988) the intention here was not to stereotype all organisations or to draw generalisations, but rather to illustrate real life linkages between global discourse and local practice. The study attempted to ensure that the circumstances were familiar enough to be reproducible even if they could not be replicated exactly: which in any circumstance is impossible in qualitative research because different people bring different things to the situation (Seale, 1999). The case study also made it possible to expose other community concerns, such as capacity building, improving governance and the development and consolidation of democratic processes that are having increasing purchase with international and other NGOs. This in turn added a depth to this research and broadened the scope for looking at the lives of older people.

Chapter 9, which follows, provides surrounding context to the project in India, highlighting the situation for older people in India and West Bengal. The findings from and discussion of the case study are presented in Chapters 10 and 11.

Chapter 9 India case study: context and background

The least noticed of the destitute in India are the elderly. Millions of elderly in India are trapped in misery through a combination of low income and poor health. The traditional support structure of the family is increasingly unable to cope with the problem... The emerging demographic profile and socio-economic scenario of the country indicate that matters will worsen dramatically in the years to come (Government of West Bengal, 2006).⁶⁷

9.1 Introduction

The quote from the Government of Bengal above is a clear expression of the changing circumstances of older people living in India. Chapter 9 presents an overview of the main features of current policy and practice relating to older people in India and West Bengal. Its purpose is to provide a context within which IGOs working in India may be assessed for their responsiveness to the known needs of older people, as expressed through public policy in West Bengal. Sections 9.2 and 9.3 present an overview of the situation of older people living in India and West Bengal. Together the two sections provide the respective political and social contexts that have a bearing on the case study, including the key relationships with international governmental bodies. The final section of the chapter, Section 9.4 describes the development and implementation of the case study: the West Bengal Civil Society Support Programme (WBCSSP). This draws on the DFID commissioned originating documents, an interview with a member of the project design team in Kolkata and the DFID website.

9.2 Older people in India

9.2.1 Political, social and economic context

The following section addresses the key features of national and international support for social policy development in India in relation to older people. It presents some demographic features, and indicates the key legislation and main IGO activity in India of

⁶⁷<http://www.wbgov.com/portal/banglarMukh/CMSPage/BMCMSPortletWindow?mode=view&in.gov.wb>. Accessed 29-4-09

relevance to this thesis. India has attained the UN definition of an ‘ageing’ country with over seven per cent of its population now living beyond 60 years of age (Chakraborti, 2004). At the India census of 2001 the population was 1.1 billion of whom over 76 million were 60 years or more⁶⁸. Population projections for India show an increasingly ageing population (Table 23).

Table 23 Total population of India and share of different age groups in the population 1980 - 2030

Indicator	1980	1990	2000	2010	2020	2030
Population (thousands)	692, 637	862, 162	1042 ,590	1,214, 464	1,367, 225	1,484, 598
(%) aged 0-4	14.9	13.9	12.2	10.3	8.8	7.3
(%) aged 5-14	24.4	24.0	22.8	20.5	17.9	15.5
(%) aged 15-24	19.6	19.1	19.4	19.3	17.9	16.3
(%) aged 60 +	5.8	6.1	6.7	7.5	9.8	12.4
(%) aged 65 +	3.6	3.8	4.3	4.9	6.3	8.4
(%) aged 80 +	0.4	0.4	0.5	0.7	0.9	1.2
Median age (years)	20.2	21.1	22.6	25.0	28.1	31.7

Note: medium variant. Source: United Nations World Population Prospects: The 2008 Revision

Since 2002 the country has experienced rapid growth in its GDP, averaging approximately eight per cent, and if sustained will bring it within the top five largest world economies within 20 years (DFID, 2008). This rapid growth of the economy with its high ranking GDP belies the huge disparities in wealth. Eighty per cent of the population is living on or below the poverty line: 400 million people live on less than US\$1 a day and 900 are million living on less than US\$2 a day (ibid). India’s HDI was ranked at 128 out of 177 in 2007/08 –this was the second highest HDI rating for the Indian sub-continent, (Sri Lanka was the highest) (UNDP, 2007a).

India is a federation of States (see Map 1), with specific relations between the national level (Government of India) and individual States. GOI policies rely on State government for implementation and full or part funding, yet not all GOI or State policies ever receive the necessary Government Order for implementation. Thus national policies

⁶⁸ Government of India Ministry of Home Affairs
http://www.censusindia.gov.in/Census_Data_2001/India_at_glance/broad.aspx

do not always translate into local action, and when they do local implementation may not be consistent (Ferguson, 1994).



Map 1 Political map showing all the states and union territories of India with their capital cities.
Source: www.mapsofindia.com

India reflects the range of issues, described in Chapter 2, associated with ageing populations in LDCs. It is experiencing falling birth rate and child mortality, increased life expectancy (see Table 24), a weakening joint family system, an increasing cost of

living, changing attitudes to older people, the erosion of traditional values among the young and inadequate financial and social security systems to support older people. The number of people over the age of 60 is approximately the same as the number of the Scheduled Tribes in India.⁶⁹

Table 24 Key demographic indicators India 1980 - 2025

Indicator	1980-1985	1990-1995	2000-2005	2010-2015	2020-2025
Births per year, both sexes combined (thousands)	25, 274	27, 823	27, 613	26, 351	24, 083
Deaths per year, both sexes combined (thousands)	8, 779	9, 434	9, 700	10, 164	11, 018
Population growth rate (%)	2.24	2.01	1.62	1.27	0.92
Infant mortality rate (infant deaths per 1,000 live births)	97.6	78.5	61.8	49.5	41.6
Life expectancy at birth, both sexes combined (years)	56.0	58.8	62.0	65.2	68.1
Life expectancy at birth, males (years)	56.1	58.3	60.9	63.7	66.4
Life expectancy at birth, females (years)	56.0	59.4	63.3	66.9	70.0

Note: medium variant. Source: United Nations World Population Prospects: The 2008 Revision

The majority of the older population in India currently live in rural areas (see Table 25) unnoticed in public social policy. Forty per cent of those in their 60s are working, or for males only the figure is 61% (Bhagat and Unisa, 2006). In sharp contrast with traditional expectations, 11% of India's older population live outside of the intergenerational home, and on their own.⁷⁰ By 2025, an estimated 25% will be living independently (Bhagat and Unisa, 2006).

⁶⁹ *ibid*

⁷⁰ See HelpAge India, available at www.helpageindia.org, last visited May 2, 2008.

Table 25 Selected indicators for economic status of older people in India

% Rural/urban older population *	% persons aged 60+ in paid work#	% persons aged 60+ with pension**	Personal support ratio (no persons 15-64 yrs per older persons 65+	
			2000	2050
72/28	40	22	13	4

*Source: http://censusindia.gov.in/Census_Data_2001/India_at_glance/broad.aspx

Source: 2001 Census Ministry of Social Justice and Welfare, Govt of India

** Source: Lloyd-Sherlock, 2010:223

+ Source: Chakravorti, 2004:45

India's development is largely planned and managed through its Five Year Plans. Its two most recent GOI Five Year Plans contain sections dedicated to old people. The 10th Five Year Plan (2002-2007) raised issues of practical support to older people; the current 11th Five Year Plan (2007-2012) reiterated these and proposed to 'further the rightbased (sic) approach' (GOI, 2008a:134). More detail on how the Plan addresses the interests of older people is provided later in Section 9.2 of the thesis. The overall focus of the 11th Five Year Plan is towards promoting inclusive growth however, including older people.

Inclusive growth demands that all social groups have equal access to the services provided by the State and equal opportunity for upward economic and social mobility. It is also necessary to ensure that there is no discrimination against any section of our society. In India, certain social groups such as the Scheduled Castes, Scheduled Tribes, Other Backward Groups and Minorities have historically been disadvantaged and vulnerable. Then there are certain other groups which may be discriminated against and which suffer from handicaps. These include persons with disabilities, older persons, street children, beggars and victims of substance abuse (GOI, 2008a:102).⁷¹

Three other key national government programmes have a bearing on the case study. First, the National Rural Health Mission (NRHM), launched in April 2005 for the period 2005 – 2012, which seeks to improve the volume and quality of healthcare to rural areas.

⁷¹ GOI Five Year Plan 2007 – 2012 Volume I, Chapter 6 Social Justice: Scheduled Castes, Scheduled Tribes, Other Backward Classes, Minorities, and Other Vulnerable Groups Introduction

The ‘Goal of the Mission is to improve the availability of and access to quality health care by people, especially for those residing in rural areas, the poor, women and children’.⁷² The NRHM makes no reference to an increasing older rural population. Second, the National Rural Employment Guarantee Act (NREGA), India’s central employment programme introduced in 2005 to provide a legal guarantee of one hundred days of employment per household in every financial year. It is open to all rural households in the areas notified by the central Government and is made available to members of any rural household willing to do public-works-related unskilled manual work at the statutory minimum wage. The entitlement of 100 days per year can be shared within the household; more than one person in a household can be employed simultaneously or at different times (GOI, 2008b:5.1). The third relevant programme is the Right to Information Act (RTI), introduced in 2005, which seeks to increase the accountability of government to all its citizens.

India is a recipient of international and bi-lateral aid for development assistance with few international donors today. The UN provides technical, financial and development assistance in a number of areas in India. Its current work programme for India is framed within the India United Nations Development Assistance Framework (UNDAF)⁷³ 2008-2012. This has been formulated within the context of the 10th and 11th Five Year Plans and the MDGs. In particular, it follows two government priorities: promoting gender equality and strengthening decentralisation. It is concerned also with implementation issues seeking to pay ‘particular attention to the inclusion of the voices of the marginalised groups’ (UNDAF, 2007:1). Four cross-cutting issues were further prioritised: decentralisation, capacity development, disaster risk reduction, and a human rights-based approach to development (ibid p8). UNFPA holds the global responsibility on ageing for the UN. It has been helping India in supporting the strategy endorsed by the 1994 International Conference on Population and Development (ICPD), which, as noted earlier in Chapters 4 and 5, was concerned primarily with reproductive health and population growth. Its programme in India is thus concerned with empowering women

⁷²Source http://www.mohfw.nic.in/NRHM/Documents/Mission_Document.pdf p2

⁷³ India-United Nations Development Assistance Framework (UNDAF) 2008-2012 is the strategic framework for the UN strategy and implementation programmes in India.

and expanding access to education, health services and employment opportunities. There is no evidence of interest in the concerns of older people or ageing.⁷⁴

DFID is India's largest bi-lateral partner with a national programme and four State programmes. West Bengal is one of these States. DFID produces a country-level strategy and state strategies designed to meet the particular challenges faced by each state (Barr, J., S. Basavraj, et al. 2007). DFID seeks to support India's Five Year Plans and to work alongside other international programmes. As it states in a public information sheet:

DFID is timing its new Country Plan to align with India's 11th Five Year Plan ... We harmonise where useful: DFID pools its funding for some health and education programmes with the World Bank, USAID and the European Commission. Partnership agreements are in place between DFID and the World Bank, ADB, UNICEF, UNDP and ILO (DFID, 2008).⁷⁵

DFID believes that good governance and tackling social exclusion are essential tools in reducing poverty. Its policy paper 'Reducing poverty by tackling exclusion' stressed that poverty reduction policies often fail to reach socially excluded people unless they are specifically designed to do this (DFID, 2005b). With these principles in mind DFID has actively supported programmes that enable marginalised groups and civil society in India to demand better services from government. During the period 2001-2007⁷⁶ it provided extensive support to a bi-lateral outreach project 'Poorest Areas Civil Society Programme' (PACS), a programme which supported civil society organisations in the 100 poorest districts of India. The PACS Programme aimed to improve the take up of rights and entitlements by women and socially excluded communities, and advocated for a more socially inclusive environment (InfoChange, 2008). The interests of older people were incorporated in the programme through the formal engagement of HelpAge India.

⁷⁴ Source: http://india.unfpa.org/2008/12/07/234/unfpa_in_india/. Accessed 17 March 2009

⁷⁵ DFID Information Sheet on India April 2008 Accessed April 2009. ADB= Asian Development Bank

⁷⁶ Available at: <http://www.empowerpoor.org/>

9.2.2 Structures and support for older people in India ⁷⁷

Government programmes in India are generally for the ‘official’ working age population 15 – 59 years old (Ghosh, 2009⁷⁸). The coverage of contributory pension schemes is however low, particularly in rural areas (Pal S. and Palacios R., 2008:51). There are no large income generation programmes specifically designed for older people and aside from the national pension scheme, there are no substantial public social or health insurance schemes for older people. In 1995 the government introduced The National Old Age Pension Scheme (NOAPS).⁷⁹ This is a centrally sponsored means-tested scheme, administered by each state. It is for those aged 65 and over who have no regular means of subsistence, from either their own sources or through financial support from family members (HAI, 2009).

The Government of India has acknowledged that many different bodies will need to engage with the changing circumstances of an ageing population.

In the coming years with increasing number[s] of the elderly, more so of elderly women, [it] makes it necessary to suitably reflect the economic, social and physical concerns of the older people in public policies, programmes and interventions as also in the mobilisation of the civil society (GOI, 2002:94).

Few new resources are forthcoming though. Alam (2009) noted recently the absence of support in rural areas for older people:

Most of the elders in India reside in rural areas without any significant public support or conducive socio-economic environment; and rural ageing and its issues have not only failed to draw public attention, but have also remained dormant issues for many of the mainstream economists and social scientists (Alam, 2009:48).

Although the old age pension was raised in 2007 from 75 rupees (£1UK) to 400 rupees (£5.50UK) per month for each beneficiary, to be financed in equal measure by the national government and each state, this was barely enough, at 2009 prices, to buy sufficient rice for one person per month. Eligibility criteria may vary among different

⁷⁷ Further information on what is available nationally for older people can be found in Appendix 12, as a briefing paper prepared by the researcher for a workshop in Kolkata.

⁷⁸ Personal communication, 6 February 2009, with Dr Ghosh at Institute of Development Studies Kolkata (IDSK)

⁷⁹ The scheme was renamed the Indira Gandhi National Old Age Pension Scheme (INOAPS) in 2007.

states and in 2008 an estimated 15.7 million people in India were entitled to the NOAPS – approximately 20% of the total older population (Kinsella and He, 2008). With private and civil service pensions it was estimated in 2007 that about 22% of people aged 60 or over were receiving some form of pension. Other than civil service pensions the amounts were barely above subsistence levels (Lloyd-Sherlock, 2010). Two food ration schemes exist for those over 60 or 65 years of age who are ineligible or who have no access to a state pension.⁸⁰

Apart from pensions, the most notable supportive national legislation for older people is the substantial National Policy on Older Persons (NPOP), introduced in 1999, and its revised scheme which came into effect in April 2008. Its stated goal is:

to strengthen older people's legitimate place in society and help older persons to live the last phase of their lives with purpose, dignity and peace (NPOP, 1999: section 15).

The NPOP expressed support for financial security, shelter, health care and nutrition; it put an emphasis on education, training and information needs, and on providing concessions and discounts to older persons. Special attention was given to protecting and strengthening their legal rights and acknowledgment given to the contribution made by older people to society. Mention was made of the role of NGOs in India, and there was much exhortation to other government departments to address the interests of older people. Resources were not however identified, thereby failing to afford much practical strength to the aspirational programme.

The stated commitment of the NPOP in 1999 to improving the lives of older people continued nonetheless, and the 11th Five Year Plan (2007-2012) contains specific references and duties to old people, with a number of accompanying initiatives. Areas of

⁸⁰ The two schemes are the: Antyodaya Anna Yojana.(AAY) for households headed by widows or terminally ill persons or disabled persons or persons aged 60 years or more with no assured means of subsistence or societal support, and the Annapurna Yojana.(AY) for 'destitute persons of more than 65 years of age having no regular source of income and not availing benefit of national old age pension scheme are distributed 10 Kg. of food grains free of cost every month. Source

specific concern are set out in Volume 1, Chapter 6 (paras 6.188 – 6.196) on Social Justice which concerns minorities and vulnerable groups. Volume 2 recognises the different health needs of older people and also introduces specific initiatives, such as increasing training in geriatric care. Additional references to ‘old people’, ‘the aged’ and elderly people can be found in Volume 3, in which older people are listed among other categories, such as Scheduled Castes and Scheduled Tribes, who should benefit from housing and other infrastructure development. The 2008 Integrated Programme for Older Persons (Revised Scheme) reinforced the aims of the earlier NPOP to ‘improve the quality of life of the Older Persons by providing basic amenities such as shelter, food, medical care, day and entertainment opportunities, encouraging productive and active ageing’ and strengthening intergenerational relationships’ (GOI, 2008)⁸¹. While some stated commitments are in place which recognise both the changing age structure and changing perceptions of older people in Indian society, resources have again to be found to effect these proposals and programmes. In addition to its domestic statements of commitment to older people India plays a role on the world stage on ageing issues. It attended the 2002 World Conference on Ageing in Madrid and contributed to the 2007 review and appraisal of MIPAA. The Ministry of Social Justice of the Government of India holds the lead for review and appraisal of MIPAA in India. As an active member of the Economic and Social Commission for Asia and the Pacific (ESCAP), India has contributed to the regional programme for implementation on ageing. The objectives and goals of this programme were reviewed at a five-year Regional meeting held in October 2007 in Macao, China⁸². The country assessments of the ESCAP Plan showed that gradual change in policies and programme approaches had been taking place, but that inadequate allocation of funds continued to hinder Governments’ efforts to develop more effective interventions to meet the growing demands of old age.

At the same time there is recognition that gerontological responses in India have been influenced by western ideas and have not been reflecting the reality of the Indian situation (Prasad, 1987, Chakravarty, 2009).

⁸¹ Source: Government of India Ministry of Social Justice and Empowerment <http://socialjustice.nic.in/ipop.php?pageid=3>. Accessed: 15 September 2010

⁸² Regional Review of the Implementation of MIPAA in Asian and The Pacific ESID/HLM-MIPAA/INF. 29 October 2007

‘[Gerontology] needs to reflect a very different situation in India, such as there being many more people and no history of welfare. [We] cannot afford western style welfare responses. When poverty, housing and food are still essential there is no time for studies on active ageing, leisure etc’ (Chakravarty, 2009).⁸³

A range of different bodies are seeking to address, ranging from medically based initiatives community based responses. The programme for the Indian 2009 International Congress organised by the All India Institute of Medical Sciences (AIIMS), Indian Academy of Geriatrics (IAG) and IAG in New Delhi presented a three-fold approach to addressing the needs of older people: ‘to bring gerontology and geriatric medicine to the mainstream in India, [to] establish feasible and scientific models for long term care and [to] establish assistive technology in making old age comfortable and independent.’⁸⁴ A path, suggested by Chakravarty (2009), would be to examine how older people are situated in the family domain and the public sphere.

‘Within the family the value of old people is still there and they are respected; but within the social arena they are gradually becoming marginalised, with very little engagement in social activities. The Government is trying to understand it and is doing something in response. It is aware of the fact but government can’t help. But equally the family can’t help with all the problems either. Old people need to be of value in the household’⁸⁵.

The year 1988 saw the establishment of the national umbrella organisation The Indian Federation on Aging (InFA), with its joint aims of improving the status and welfare of older people. InFA acts as a national coordinating body with Central/State Governments, and other sections of the public sector, including NGOs, on issues of concern to older people. Though their lobbying capacity is still weak there is today a growing network of senior citizen organisations, seeking to provide opportunities for supporting the interests of older people, and enabling them to exert more control over their lives (Nayar, 2005). Membership of the Pensioners Association is limited to retirees from government organisations, such as the civil service, the armed forces and postal workers. 1999 saw the emergence of the Federation of Associations of Senior Citizens, following the announcement of the NPOP. Members of The Association of Senior Citizens are mostly

⁸³ Personal communication 5 March 2009 – Dr Chakravarty, Director, Calcutta Metropolitan Institute of Gerontology

⁸⁴ Source: IAGG email newsletter for IAGG Conference in Paris, 2009. Sourced: 6 March 2009

⁸⁵ Personal communication 5 March 2009 – Dr Chakravarty, Director, CMIG

urban-based and middle class. There are also national and local NGOs working with and for older people in India. HelpAge India is the key national NGO working on behalf of older people in India. Its 'mission is to work for the cause and care of disadvantaged older persons and to improve their quality of life' (HelpAge India, 2009:2), which it seeks to achieve through supporting the provision of services by its state-based branches, offering national advocacy and campaigning and support to independent forums of older people. India AgeWell Foundation likewise has a significant national profile seeking to raise awareness of older people as both contributors to society and potential beneficiaries of support services, and promoting the voices of older people locally through support to older people's forums.⁸⁶

In summary there is political recognition in India of the changing circumstances its older population, as evidenced through the increasing legislation in their favour, but the means and resources for meeting these changes have to be developed.

9.3 Older people in West Bengal

This section provides an overview of the context in which the WBCSSP developed and the management and activities of the programme. It describes in more detail the activities of the two external international development bodies which have a bearing on the WBCSSP. These are the DFID-I and UNDP, both of whom have played influencing roles, either directly or indirectly, in promoting good governance and human development in West Bengal.

9.3.1 Political, economic and social context

The state of West Bengal is located on the eastern side of India, has a population of 82 million and is the fourth most populous state in India with the highest population density in the country.⁸⁷

⁸⁶ Source: Agewell Foundation India website

⁸⁷ Source: West Bengal Human Development Report 2004,

Table 26 West Bengal key demographic indicators 2001

Total pop West Bengal	No of population aged 60 and over	% WB population aged 60 and over	% Scheduled tribal population*	% Rural older population
82 m	5.7m	7.1%	5.5%	72.03%

Source: National Rural Health Mission West Bengal 2007-08. Census 2001

The share of people in 2001 over 60 years was 7.1%, projected to rise to 8.5% by 2011.⁸⁸ In 1999-2000, an estimated 32.9% of the population lived below the poverty line. Life expectancy in West Bengal is slightly higher than the national average for India: 66.1 and 64.1 respectively for men, and 69.3 and 65.4 respectively for women⁸⁹ It is the third most urbanised state in India, with a slum population in excess of 6.5 million, more than half of whom lack access to basic civic amenities such as drainage, sanitation and drinking water (Barr et al., 2007). Muslims, Scheduled Castes (SCs) and Scheduled Tribes (STs) together, account for more than half the state population, the proportion of all three groups being higher in the poorer Northern Bengal districts (Barr et al., 2007).

West Bengal's political situation has been stable for over thirty years. It was led by the Communist Party of India (Marxist) from 1977 until 2009 when the All India Trinamol Congress was elected. The dominant political culture of West Bengal had taken a strong anti-NGO stance, accusing NGOs of being neo-colonial. It has been suggested that this has contributed to a weak civil society (Akerkar, 2005). Like central government, West Bengal also works to five year plans. Development change in the State has been driven by the dual aims of reducing poverty and enhancing participation and inclusion in society. The main policy planks have been land reform and decentralisation (GoWB, 2004). Local government structure has been changing over the last few years to improve democratisation in West Bengal and the evolving decentralisation framework of the panchayat system (council structure) at district, block (ward) and gram (village) levels

⁸⁸ Source: State Resource Centre, Department of Health & Family Welfare, GoWB April 2007

⁸⁹ All figures from National Rural Health Programme Implementation Plan 2007-08 – Source census 2001

has included support for civil society.⁹⁰ A new support programme (panchayat sahay) for the very poor and the destitute is in the process of being set up, following a state-wide house-to-house survey throughout the state to identify the very poor. At the State level, the 2007-2008 NHRM Programme Implementation Plan (PIP) for West Bengal contains one reference to an ageing population as a matter to be addressed, but makes no planning, policymaking or budgetary proposals as to how the specific needs of older people living in rural areas may be addressed.

UNDP, referred to at the start of this section, has been playing two main roles in West Bengal. Firstly, it has been working as a partner with West Bengal in a targeted development assistance plan to strengthen local government, with specific reference to achieving the MDGs locally. In 2006 the Government of West Bengal (GoWB) signed a tripartite Memorandum of Understanding (MOU) 'Strengthening State Plans for Human Development' with the Government of India Planning Commission and UNDP. A follow-up Project Co-operation Agreement was signed with the UNDP outlining the objectives and activities to affect the MOU framework.⁹¹ This has had to fit within UNDP's programme for India.⁹² The key objectives of the programme were to build the 'capacity of the state planners to provide a human development perspective in the State Plan, relevant policies and programmes.'⁹³ The main components were to improve the efficiency of local government and develop a public education programme which would include 'sensitising the staff to the MDG parameters for Human Development' in relation to child and public health.

Secondly, as the UN agency responsible for assessing progress in human development globally, UNDP supported the West Bengal Development and Planning Department in producing its State Human Development Report in 2004 (GoWB, 2004). In addition to the traditional issues covered, such as health and livelihoods, the West Bengal HDR addressed land reforms and decentralisation, human security, material conditions,

⁹⁰ CSSP Design Team October 2003 Annex 6 para 5.

⁹¹ Government of West Bengal, Development & Planning Department No.291/DP/P/P-1S-20/04(Pt) 4th Sept 2006

⁹² Personal communication – Government of West Bengal 26 March 2009

⁹³ *ibid*

environment and problems of special regions within the State. A follow-up report prepared in 2006 by UNDP's own evaluation department on the process of producing the SHDR highlighted the areas of success, of underperformance and emerging issues (Riskin and Saxena, 2006). Despite the evidence indicating a growing older population and changing age structure these were not addressed as issues for further consideration by Riskin and Saxena.

For the last 10 – 15 years the GoWB has received development funds from DFID through bi-lateral agreements. These have been primarily directed towards improving education, health, rural decentralisation, urban development and restructuring the public sector. In 2007 there were four major programmes, two of which had budgets in excess of £100m (Barr et al., 2007). The DFID India strategy regarding engagement with civil society is set out within the Country Assistance Plan (2003). This states that support to civil society is primarily concerned with strengthening the capacity of poor people to participate in decisions affecting their lives.⁹⁴ The WBCSSP was an important part of this programme. Initiated and funded by DFID, it was established to help 'strengthen civil society engagement in pro-poor policy dialogue and implementation in West Bengal' (DFID, 2005a:1). The only major donor other than DFID in West Bengal is the Asian Development Bank, whose operations 'combine infrastructure development (primarily water, sanitation, and waste management) with targeted poverty reduction components and a strong focus on municipal reforms and capacity building' (ADB, 2005.⁹⁵)

9.3.2 Support for older people in West Bengal⁹⁶

Article 41 of the Indian Constitution (1949) encourages each state to make effective provision for public assistance, within the limits of its economic capacity and development, in cases of unemployment, old-age, sickness and disablement.⁹⁷

⁹⁴ Annex 1: Design, Civil Society Support Programme (CSSP), CSSP Design Team, October 2003

⁹⁵ <http://www.adb.org/Documents/CSPs/IND/2005/csp0200.asp>. Further details of available can be found in Appendix 12: *Justice for All: report of a PRIA/WBCSSP workshop*.

⁹⁶ See Appendix 7 *Overview of Government Structure, Policies and Entitlements relating to older people in West Bengal*, Lipman (2009)

⁹⁷ Source: Older Persons Maintenance, Care and Protection Bill, 2005

Table 27 below summarises key resources provided by the State of West Bengal. These are as GOWB states ‘small relative to the requirement of society’ (GoWB, 2004:172). A senior official in the GoWB reinforced the point that families are unable to provide the necessary support:

‘There is a misplaced notion that old people are being looked after by their families...but economic pressure and paternalist pressure is affecting them [and there is] a general decline in support for them. Unless you own property or money you may not get respect’ (Roy, 2009).⁹⁸

Table 27 Selected indicators of government support for older people in West Bengal

National Pension (eligibility 65 +years)	WB State pension (eligibility 60 + years)	Day Care Services	Residential Care
BPL available to those on income less than 100Rs per month	Provided to 66,000 persons (1.1% of older population)	0	1 unit (occupancy not known)

Source: West Bengal Social Welfare Directorate 2009

The GoWB provides 200 rupees per person over the age of 65 years, to match the National Old Age Pension Scheme (see Section 9.2.2 above). It has also established its own pension scheme. In 2009 this provided 750 rupees per month to a total of 66,000 men and women of 60 plus years. This represents about 1.1% of the nearly six million older people living in West Bengal.⁹⁹ Unlike the national fund, the GoWB fund is finite and distributed on a ‘first-come first-served’ basis, subject to certain poverty criteria which need to be supported by documentary evidence.¹⁰⁰ There are a few discrete occupation-based pensions available from different government departments, for fisherman, farmers, artisans and handloom weavers. The sums are small and the procedures for their allocation are unclear. The website for GoWB welfare for older

⁹⁸ Personal communication: Dr Roy Principal Secretary Panchayat and Rural Development Dept, GoWB, 1st April 2009 Kolkata

⁹⁹ The last census was 2001. A current figure for the percentage of older population receiving the WB state pension is not available. Source: Director, Social Welfare Directorate – personal communication 30 March 2009, Kolkata.

¹⁰⁰ *ibid*

people provides basic information about old age homes and pensions.¹⁰¹ It explains that old age homes are either free, providing care ‘for the destitute old people who have no one else to care for them. They are given shelter, food, clothing and medical care’, or they are fee paying. ‘Nowadays, such "retirement" homes have become very popular in India and they are well worth considering’.¹⁰² The GoWB provides one old age home. It was not possible for the researcher to establish occupancy levels. NGOs run 32 residential homes for older men and women throughout West Bengal. A number of day centres are also provided by NGOs, including by HAI-India and the CMIG. HAI-India is the largest single provider of support and services for older people in the State. As well as day centres and residential care HAI in West Bengal offers advice and information for older people and their families, and mobile medical units which provide health education and distribute basic medicines to help older people manage chronic health conditions.¹⁰³

9.4 Design and structure of WBCSSP

The CSSP was developed to enhance the role of civil society in West Bengal and provide an opportunity for it to participate, contribute and influence the pro-poor development policy formulation and the implementation. It singled out specific interests and groups to support. In the broadest terms the constituency or target groups for the programme were to be the ‘poor, vulnerable and marginalised’.¹⁰⁴ Poverty was seen as being in:

‘its multiple dimensions, (i.e. not just economically poor), including vulnerability as a measure of resilience against shocks or stresses, and marginalisation as a measure of social differentiation and exclusion’.

Source: Annex 1: Design, Civil Society Support Programme CSSP Design Team, 2003:5 para: 4.2.5).

The types of groups for consideration fell into four main subsets (see Table 28). Women were viewed as a cross-cutting group who were to be integrated into all of the themes. In concert with a GoWB priority to support rural areas, rural groups were encouraged to apply to take part in the programme. The broad parameters for the design of the

¹⁰¹ Government of India Department of Women and Child Development and Social Welfare <http://wbcs.gov.in/> About Us Accessed 4 June 2010

¹⁰² *ibid*

¹⁰³ Interview 9th February HAI, Kolkata

¹⁰⁴ Annex 1: CSSP Design Team, October 2003

WBCSSP were set by a scoping study commissioned by DFID (UK) in January 2002.¹⁰⁵ WBCSSP was to operate from 2005 - 2010.

Table 28 Constituency for inclusion in WBCSSP

Subsets of poor	Groups included in subsets
Socially disadvantaged groups	Scheduled Castes; Scheduled Tribes; minorities
Displaced persons	Refugees, environment-development related displaced, seasonal migrants
Labour	Rural and urban (agriculture, dangerous & hazardous occupations and the informal sector)
Women	Sex workers, poor working women (and those with gender considerations above)

Source: Annex 1 CSSP Design Team, October 2003

There was extensive consultation in its design, including stakeholders such as UNICEF, international and national NGOs and other civil society actors (Barr et al., 2007). The detailed design of the programme was prepared in 2003 by a committee brought together by DFID, comprising civil society organisations, government and international experts, and was finalised after a series of discussions with various stakeholders.¹⁰⁶

From the outset the Project Concept Note agreed between DFID and the Government of West Bengal for CSSP design specified the design would concentrate on three thematic areas: empowering community-based organisations of the poor at the grassroots levels, enhancing the capacity of a broad range of civil society organisations to engage more effectively with government, and promoting the rights of the poor.

Source: Annex 1: Design, Civil Society Support Programme CSSP Design Team, October 2003
Page 3 para: 3.4

Designed to raise the capacity of people to take part effectively in the development of the State,¹⁰⁷ it fitted squarely with the Tenth Five Year Plan of West Bengal to consolidate the gains of decentralisation. The programme was designed to work with local government structures but was entirely independent of local and State government control. The

¹⁰⁵ Civil Society Support Programme (CSSP), CSSP Design Team, Annex 1: Design October 2003

¹⁰⁶ WBCSSP Procedures for Grant Application information leaflet

¹⁰⁷ Annex 1: CSSP Design Team May 2005

Panchayat & Rural Development Department, Government of West Bengal, was the designated nodal agency for the programme, should any problems arise. Participatory Research in Asia (PRIA), was appointed, in line with DFID procurement procedures, to be the external Programme Managing Agency (PMA). PRIA is an international not-for-profit organisation, based in New Delhi, whose aims are to encourage learning and promote participation and democratic governance. PRIA's primary mechanism for affecting the programme goals was through the allocation and management of project grants. It had three further major responsibilities: (i) to identify areas for skills development among state-based CSOs and to seek expertise from beyond the state to support this, (ii) to encourage learning and (iii) to design communication and dissemination strategies.¹⁰⁸

The programme was launched in August 2007. It was worth £5.3 million (about Rupees 40 crore) and was to run till the financial year 2010-11.¹⁰⁹ The areas selected for implementation, identified using the District Human Development Indicators, were the eight poorest districts of West Bengal: Coochbehar (Koch Bihar), Jalpaiguri, Uttar Dinajpur, Dakshin Dinajpur, Malda, Murshidabad, Birbhum, and Purulia (see Map 2). The CSSP itself is administered on a day-to-day basis by three local offices created specifically by PRIA to manage the Programme. These are the main office in Kolkata and two field offices in Malda and Jalpaiguri that cover the north and west districts. Between them the three offices employ about ten people.

A Project Advisory Committee consisting of civil society members provides ongoing guidance and advice. Overall financial control and monitoring of the WBCSSP are undertaken by the PRIA Head Office in New Delhi, who submit regular reports to DFID. Bangla and English are the languages used by the managing agency for all its daily work and correspondence.

¹⁰⁸ *ibid*

¹⁰⁹ Press release: DFID Launches Civil Society Support Programme in West Bengal DFID New Delhi 3 March 2007



Map 2 Districts of West Bengal

9.4.1 The WBCSSP grantholders

The grants programme was the dominant mechanism for achieving the goals of the WBCSSP, (see Chapter 8.3). The emphasis of the research in this case study was thus placed on that aspect of WBCSSP activity. Applications for the grant programme were called for in the local and main newspapers in West Bengal in 2006, from civil society and community based organisations and projects. Applicants had to indicate how their work would promote a pro-poor agenda, to demonstrate that they had civil society expertise, and to provide a programme, a budget and documentary proof that they were registered under national government requirements to receive foreign funds, (the Foreign Contribution Registration).¹¹⁰ Over 200 applications were received.

PRIA made the selection of projects which it submitted for approval to DFID in Delhi and to the Department of Economic Affairs, India. They sought to ensure that the projects between them covered all the “backward” groups of West Bengal. Sixty one grants were awarded. Not all the targeted geographical areas were able to put forward eligible organisations. Some groups did not have the Foreign Contribution Registration; others did not meet the necessary management and financial controls, and ‘others did not have the confidence to apply’.¹¹¹ As a means of ensuring that all targeted areas were included PRIA developed a Fellowship Support Programme, giving individual scholarships or grant support to enable individuals to work with poor communities and build their capacities to access government schemes. The role of the CSO and the Fellow was to build the capacity of individuals to make demands to help them achieve their rights, to identify gaps in local take-up of government schemes, make suggestions for improvement, and to ‘handhold individuals’ when meeting government authorities. PRIA categorised the 61 project holders into ten different themes, indicating the WBCSSP priority area for each of those organisations (see Table 29). The work of a number of the project holders covers more than one theme. Forty-five individual Fellows were working on the thematic areas of health, focusing on safe motherhood and child

¹¹⁰ Promotional leaflet: *WBCSSP Procedures for Grant Application* PRIA 2006

¹¹¹ PRIA personal communication 12 February 2009

survival; education, with a focus on strengthening primary education; and strengthening and nurturing women's rights through self-help groups.

Table 29 Thematic intervention by district

Themes	Grantee CSOs	Districts	Blocks	Gram Panchayats
Health & Nutrition	14	6	20	118
Food & Work Security	13	7	16	83
SHGs based inclusive development	12	6	66	115
Education	5	5	7	29
Women's Rights	7	5	7	14
Disability	3	3	12	100
Biodiversity	2	2	2	10
Right to Information	2	6	69	-
Decentralisation	2	4	46	-
Trafficking	1	1	3	11

Source: PRIA information leaflet February 2009

PRIA's ongoing role with the grant holders has been to control and monitor the flow of funds to them and to provide programme monitoring support, training and workshops on themed subjects concerned with particular target groups and areas of work. Monitoring included regular visits from PRIA support staff from the West Bengal offices and the completion of a quarterly pro forma. The pro forma, designed by DFID, gathered information on the themes indicated in Table 29, on the targeted marginalised groups, and the activities of the programme. For each theme there were also cross-cutting measures for the different marginalised groups identified by WBCSSP: i.e. STs, SCs, Other Backward Classes (see glossary, page 331), women and Muslims. Additionally each project holder had its own frameworks reflecting the main focus of their respective organisation. As well as supporting individual projects the Programme conducted state level activities to encourage policy level advocacy, provided training events, arranged

special visits with the media to engage their broader interest in civil society, and contributed to PRIA's annual international conference in February 2009 on social exclusion. The conference was organised in partnership with the University of North Bengal (NBU) at its campus in Siliguri.

At the time of the field research the project was nearing the end of its fourth year of operation and drawing to a close. There were no plans in place for continuation or follow-up of the programme.

9.5 Concluding Comments

The contextual framework has indicated a changing awareness in India and West Bengal of the situation of older people, as reflected in its public policy for older people and its increased pension, albeit that additional finances have been limited. At the international level India has been party to debates on ageing world-wide, attending the 2002 Summit on Ageing and taking part in Regional programmes. Its IGO partners, primarily UNDP and DFID, have been supportive of India's anti-poverty and pro-participation programmes, while DFID's WBCSSP initiative recognises West Bengal's commitment over many decades to decentralisation and increased inclusion.

The remaining chapters of Part IV present the findings from the fieldwork. They are presented in two parts: the first, Chapter 10, is concerned with the policy arena, expressed through the different tiers of governance of IGOs and INGOs working in-country and presents the findings from the research with the policymakers and funders. The second part, Chapter 11, examines the experience of the grassroots organisations and the different stakeholders engaged in the day to day life of the case study. The purpose in separating these is to identify the impact of the discourse on practice. Part IV concludes with a summary of whether the case study research met its aims.

Chapter 10 Findings: policy makers and funders

10.1 Overview

This chapter presents the detailed findings from the direct and indirect stakeholders whose work was concerned primarily with research and policy formulation and implementation, related to this case study. The evidence is drawn from a textual analysis of a range of documents and 16 formal interviews. The majority of the informants in IGOs and INGOs were in senior decision-making roles in their respective organisations (see Appendix 7). They were thus in positions to directly influence the policy and practice of their own particular sphere of activity, as well as that of their wider organisation, in some instances. Further details of how the research was carried out can be found in Chapter 8. Supporting documentation was gathered from all the organisations interviewed, including information about Government of India policies and services available for older people in India. See Appendix 10 for list of documents reviewed.

The policy findings begin with an overview of the documentary evidence to illustrate how the interests of older people have been formally represented by the different agencies engaged in this research. Table 30 presents a summary of the word frequency and textual analysis on each of the documents. It shows there were very few references in the texts from the UN agencies (Tier 1); there were none in any of the DFID documentation relating to either their national programme or local programmes in India (Tier 2); and the number was negligible for the NGOs and CBOs (Tier 4). Indeed, there were no references to older people from any one of the bodies directly engaged with the WBCSSP. The arena in which there was expressed interest in older people lay mostly with the Government of India (see Tier 3). The information in Tier 3 is a summary of the documentary analysis in Chapter 9, Sections 9.1 and 9.2 and is thus not discussed any further in Chapter 10.

Table 30 Documents reviewed for WBCSSP

Tier	Organisation	Document	Refs to Older People	Context
Tier 1	UN in India: UNDP	- UNDAF 2008-12 - UNDP Country Programme 2008-12	2 0	<i>Vulnerable</i> -
	UNFPA	- UNDP HDR 2006 Evaluation Review - UNFPA Country Action Plan 2008-12	0 14	- <i>Background - implications of an ageing society</i>
Tier 2	Funding Agency: DFID	- DFID India Country Plan 2008-12 - DFID Evaluation Report West Bengal 2000-2006 - DFID CSSP Program Memorandum + 6 annexes May 2005:	0 0 0 0 0 0 3	- - -
		1: Design 2: Management 3 Govt & Institutions 4: Social 5: Finance 6: Risk - PACS Impact Review 2008 - DFID: India Information Sheet April 2008	0 0 0 0 0 3 3 0	<i>Income entitlements</i> <i>2 x pension; 1 ill health</i> -
Tier 3	India: National	- 10 th Five Yr Plan 2002-07 - 11 th Five Year Plan 2007-12 - NRHM 2005	100+ 100+ 2	<i>Dedicated section Vol 2: Chapter 4.3 'Other Special Groupings'</i> ¹¹² <i>Dedicated section Vol 1: Chapter 6</i> ¹¹³ <i>Ageing population; & older woman as key informant for childbirth advice</i>
	West Bengal	- National HDR 2001 - WB NRHM-PIP 2007/08 - WB HDR 2004	100+ 2 3	<i>Section on 'elderly people'</i> <i>Impact of life course</i> <i>Elderly x 2; geriatric</i>
Tier 4	NGOs: PRIA	- Annual Report 2007-08 - Procedures for WBCSSP Grants Application 2006	0 0	- -
	AAI (India)	- Promotional flyer 2009 - Annual Report 2008	0 4	- <i>Pensions; homelessness</i>
Tier 5	WBCSSP: CBOs	Concept notes for grants	0	-

¹¹² Source: <http://planningcommission.nic.in/plans/planrel/fiveyr/10th/default.htm>

¹¹³ Source: <http://planningcommission.nic.in/plans/planrel/fiveyr/11th/11defaultchap.htm>

As the purpose of the study is to examine the links between the global discourse and local practice presentation of the findings follows the levels of activity described in the research framework (see Figures 1 and 4). Thus they start with the evidence gathered from the intergovernmental organisations, and move through each of the intermediary stages till the grassroots organisations. The findings from this last stage are, as stated earlier, discussed in Chapter 11. The findings for the study as a whole were framed within the broader contexts of development and ageing in India and informed through interviews with both academics and practitioners in the disciplines of development and gerontology; and with an international NGO working across India, though not directly involved in the case study.

10.2 Intergovernmental organisations

Documentation from three UN sources was examined: the UN Development Assistance Framework (UNDAF), UNDP and UNFPA. UNDAF's stated priorities are concerned with 'Promoting social, economic and political inclusion for the most disadvantaged, especially women and girls' (2008:1). The Framework goes on to say: 'Current data indicates that sections of the population, disadvantaged on the basis of geography, caste or gender, continue to remain excluded from access to public services and perform poorly on the socio-economic indicators' (ibid:4). It makes two references to older people, both of which are contextual rather than expressions of interest in the wellbeing of older people. The first acknowledges that older people are one of a number of vulnerable groups of concern in the GOI 11th Five Year Plan and the other refers to 'technical assistance' that is to be provided by UNFPA.

There were no references to ageing in any of the UNDP policies and programmes for India. In contrast, UNDP does have an integration policy for mainstreaming women and gender in all its programmes. The interviewee from UNDP commented that as older people are within the purview of UNFPA, it was not for UNDP to develop older people specific programmes, in the same way that they would not develop women's programmes

(which they said would be the responsibility of UNIFEM).¹¹⁴ The respondent referred to an earlier discussion within UNDP India about their carrying out a scoping study on ageing and old people, but this had been dismissed as being part of UNFPA's brief. While UNFPA has played a critical role in assisting India to redirect its population efforts away from family planning to providing high-quality services, there has been no tradition of it promoting or leveraging support for an older population. UNFPA's global annual report for 2007 has however noted its support for research in India on ageing, while its own work plan for India for 2008-2012 highlighted its plans for identifying and undertaking research on ageing, particularly in respect of the feminisation of ageing, rural ageing and urban ageing.¹¹⁵

UNDP uses the Indian census data as a means for identifying the most 'vulnerable groups'. Its policy and practice responses focus on "exclusion" rather than "vulnerable people" on the grounds that that exclusion suggests a process, rather than a category of people'. In their terms:

'the excluded cover those left out on grounds of age, gender, HIV/AIDS, disabilities etc. Many terms are in use – vulnerable, exclusion, marginalised – UNDP will tend to use the language of [the] Indian Government because it makes for simpler exchange and negotiation. The exclusion framework is changing but ageing is still not upfront on the agenda. It is though core in the disaster and governance areas' (UNDP respondent, 2009).

The UNDP respondent commented on a lack of clarity in defining an older person may also be a contributory factor in UNDP's low recognition of older people in its policymaking and practice.

'There is confusion between "elder", who can be someone's family who is respected, and "older people". There is often an overlap between the two though. When referring to 'elder' the reference is usually to men, reflecting the traditional patriarchal society'.

¹¹⁴ UNDP New Delhi personal communication 13 March 2009

¹¹⁵ Areas for research indicated were: 'Responding to a changing demographic scenario including issues related to ageing; urbanization; Domestic and international migration; Addressing reproductive health as a poverty reduction measure; and Responding to changing age and sex distribution of the population'. UNFPA's financial contribution towards this would be \$3 million (UNFPA, 2007: 37).

The reference to a patriarchal society brings an interesting link to UNDP's work on women, and a possible route to including work with older women within their gender programmes.

The UNDP respondent stated that the agency systematically brings together their in-country experience and was currently preparing a training manual which would provide guidance on the inclusion of 'vulnerable' groups such as women, Dalits, old people, when developing projects. Change would only happen, the UNDP respondent argued, if there was agreement in policy making at the top level in the UNDP, accompanied by guidance to include new activities in the country programme - only then would it be possible to pursue new areas of work. The researcher was informed that she was: 'the first person to ever come and talk about old people in the seven years I've been here. The Ministry of Social Justice's last research in this area was twenty years ago'. Examples were cited of where older people have been present in the HIV/AIDS work as carers of children and grandchildren and in the governance and disasters mandates. The parameters described for the UNDP programme in WB, as described by the interviewee in Kolkata, were the MDGs and poverty. In essence, the primary concerns were about increasing income levels. In order to achieve this they were keen to provide employment options and basic education to improve literacy skills, to improve living arrangements, such as public facilities like water, create sustainable environments and to improve food security. The WB-based interviewee talked of the UNDP-supported planning programme as being bottom up from the ward level to the District level indicating, by contrast with the UNDP office in New Delhi that influences for change can be both bottom up and top down.¹¹⁶

The 2004 WBHDR, produced with support from the UNDP, contained a small section on social security and pensions for older people and people with disabilities (GoWB, 2004:171). There was no data relating to older people or to an ageing population in the section on demography trends; it was concerned mostly with infant and child mortality,

¹¹⁶ Personal communication Senior Research Officer, Development and Planning Department GoWB 26 March 2009

fertility control and birth, and age of marriage (ibid: 120). The health indicators, presented as the key means of assessing the health situation of the population, focused on antenatal care and immunisation programmes. There was nothing on non-communicable diseases which are of growing concern to populations with increasing numbers of elderly people (Ebrahim and Smeeth, 2005). Just as the guidance for countries and states undertaking their own HDRs makes no reference to older people, so too did the authors who evaluated the 2004 SHDR for West Bengal fail to acknowledge the lack of visibility of older people in West Bengal (Riskin and Saxena, 2006).

10.3 Funding agency - DFID

The DFID interviewee in Delhi acknowledged that DFID-I does not have a clear strategy relating to older people in India. Where it does support projects for them, it does so by working through other bodies, as with HAI and the PACS project referred to above (see Section 9.2.1).

‘[We] could push it a lot more with civil society work, but it’s not a government programme. We would need to analyse the data on such things, as the health needs of older women. This should be a requirement. What are the specific needs of old people? We could also push old age pension and benefits take up work with civil society’.¹¹⁷

The view was expressed that:

‘Every group has social rights, and each group should make demands. Maybe what are required are aged groups needing to lobby harder. Some organisations have a greater voice than others. Dalit groups are demanding nationally and internationally (including with DFID India). Organisations are not pulling together in their act or claiming their rights’.¹¹⁸

The independent evaluation (2007) commissioned by DFID UK to review its own activities in West Bengal contained no reference to older people, ageing or elders, and there were just two references to pensions in the context of people in paid work (Barr et al., 2007). Inadequate data on poverty and its impact were highlighted as problems by the authors of the report. They went on to suggest that lack of such data militates particularly against providing adequate support to women or implementing effective

¹¹⁷ DFID, New Delhi personal communication 10 March 2009

¹¹⁸ ibid

gender programmes (ibid). The West Bengal DFID office also noted that there was insufficient data on the breakdown of communities. They would wish to have more information by gender, caste and income. It was reported that the only age-related data from the government related to education services for young people and to mortality rates. There was no age-related data on health needs and service provision. The DFID interviewee stated that their priorities for West Bengal were in line with the MDGs, with the emphasis on women and children, and HIV. The interviewee stated that these groups were seen as being the most vulnerable in India, that there were more young people than old, and that the extended family system provided a safety net for old people. At the same time he noted that starvation happened mostly to old people; that problems for older people in villages would grow unless mechanisms were put in place to support income; that it was too difficult to re-skill older people to take on new employment, and that the focus of self help groups (SHG) was on women. The interviewee commented that if the overall system were improved ‘other things [would] get improved along the way, for example ambulance services in each block are free if you have a BPL card’. When asked how older people were benefiting from DFID’s programmes, the interviewee commented on the possibility of indirect benefits: ‘if the panchayat improves this will help old people’.

The interviewee from the design team commissioned by DFID to help develop the WBCSSP, said that at no time did the working group consider older people as a category for the Programme. Older people were not part of the work brief, and the material they reviewed for an analysis of local needs, such as the HDRs, did not contain data about older people. The interviewee commented that older people were not viewed in the same way as other categories. Children, disabled people, and women, for example ‘are seen as more than just charity cases...viewed perhaps as a special category of the non-working’. He thought that perhaps different perceptions of deprivation pertained to groups, such as children, people with disabilities, or older people, depending on the perceived value of their participation in the labour market. The interviewee cited that progress for improving the wellbeing of SCs and STs had started with their inclusion in the deprivation lobby concerned with employment.

Commenting that the pension is one of the largest categories in the Indian benefits systems, it was likely that the interests of older people would be addressed as part of the general increase in take up of benefits intended by WBCSSP. This suggests that there could be scope for using the pension systems as a lever for change in improving the status and wellbeing of older people.

10.4 NGOs in India

The interviewee at HelpAge India in New Delhi stated there was growing media coverage on the diminishing status of older people in Indian society, but that no studies were being undertaken on this phenomenon. He reported that advocacy in general for older people was weak and that most support for the older population, including access to health care, came from charitable sources rather than government. He added that such charitable sources did not however include the larger aid agencies and donors working in India.¹¹⁹

Comments by HAI in West Bengal and CMIG, on the changing situation for older people illustrated substantial differences between urban and rural life and between the poor and the growing wealthy middle classes. While recognising that there was greater understanding among families of the concept of respite care and that older people would ‘need more help with assisted living or care in the home’¹²⁰, this could only be available for the small proportion of the older population able to afford such services. Nair (2009) similarly noted that differences in income levels were resulting in very different responses to the treatment of ageing families, and highlighted the deeply unfortunate circumstances of those who can not afford to look after their elderly parents:

‘Old people are thrown out of homes by their children. The attitude for some families is that they can “go beg or die”’.¹²¹

A member of the staff team at HelpAge India in West Bengal talked of the need to reach out to those who are 45 years plus, to prepare them for their older years. Through

¹¹⁹ Interview: Mathew Cherian: Director, HelpAge India, 9 March 2009

¹²⁰ Interview: Dr Chakravarty, CMIG, 24 February 2009

¹²¹ Interview: Professor Nair, New Delhi, 12 March 2009

providing life-course education now, on matters such as diet and exercise, and information on the experience of being old, they were seeking to increase both the readiness of the individual to meet old age and prepare the community as a whole to support its ageing population in the absence of immediate familial support or the safety nets of state pensions, benefits and services.¹²²

AAI places a strong focus on marginalised groups and their annual report for 2008 stated that:

In our 2005–10 Country Strategy Paper *Rights First* we recognise that poverty and exclusion are causally linked to unjust social structures and power relationships, and that certain social groups are more vulnerable to poverty, marginalisation and exclusion, and within them women, children, people with disabilities and people living with HIV and AIDS are doubly excluded (Actionaid India, 2008a:2).

They report that ‘helping excluded communities fight for “full citizenship rights” as guaranteed by the Indian Constitution remains their common rallying point’ (ibid: 2).

The respondent at the national AAI office in Delhi reinforced the position that AAI was clear that it works for the marginalised:

‘even with the homeless, single people, people with disabilities, and the aged. We identify aged as most vulnerable. But when it looks at services [AAI] does not provide services but seeks to give understanding of rights’.¹²³

In respect of older people AAI had limited themselves to assessing pensions for older people and for widows. They said however that there was a lot of work being undertaken for older people by civil society but they had no information about what other organisations were doing in this respect. A perspective was offered from the point of view of the older person:

‘Older parents also find change difficult and don’t necessarily want to move to be with their children. Children no longer unquestionably take the advice of their parents’ (Indian NGO).

¹²²Interview: Staff member HelpAge India, Kolkata 17 February 2009

¹²³Interview: Staff member Action Aid India, New Delhi 9 March 2009

The respondent at the Kolkata AAI office acknowledged that they didn't know whether any of the programmes they funded or worked in partnership with did any qualitative work with older people. Quantitative assessments were observed in project reports from partners, where they were concerned with increasing the access of all in the community to benefits and pensions. AAI was not familiar with the World Summits on Ageing or their ensuing International Action Plans. The respondent was aware, and raised the subject, of other international summits and UN conferences, making the connections between these and how they in turn reflect and inform local policy and practice. When invited to comment on the absence of references to older people in the MDGs, the respondent expressed the view that major summits or conferences were not necessarily a useful yardstick for assessing the value or importance of an issue. The respondent said the outcomes of conferences were often "too watered down" by the time of their final production, and citing the Beijing women's conference of 2005 as an example, said they failed to reflect the breadth of interests and strength of feeling on given issues. The respondent commented that the absence of a Convention on older people militated against others giving consideration to older people and ageing, especially in an environment of competing demands.

AAI discussed the NGO response they had coordinated for the UN Committee on Economic, Social and Cultural Rights (ICESCR) on the condition of human rights in India. Their publication, the 'Shadow Report on Government of India's II, III, IV and V Combined Report on ICESCR', had examined each of the 15 rights enshrined in the ICESCR in relation to particular social groups they had identified marginalised: 'fisherfolk, dalits, indigenous communities, Muslims, people living with HIV&AIDS and the urban poor' (ActionAid India, 2008b). There were nearly three hundred references in the document to women and children. By contrast reference was made once in the introduction to older people, as a vulnerable group likely to be abandoned as their children were displaced or migrated to other parts of the country for work. Two further references to older people were made in relation to Article 9 on the Right to Social Security: both concerned with reducing the age of eligibility from 65 to 55 years for

women under India's national pension scheme (NOAPS), in recognition that women's life expectancy, in India, is lower than that of men.

As shown in Table 30 there were no references to older people in any of the materials produced by the national office of PRIA for the WBCSSP. In the interview at the national office of PRIA there was acknowledgement that life expectancy in India was increasing. The interviewee was aware of legislation relating to the concerns of older people in such areas as income, domestic violence and maintenance. He stated that there was no concrete evidence about the service needs of older people.

‘Nobody is doing anything for them. There is an absence of any social groupings of older people. Older people are confined to their houses and cannot get together. In urban areas they do meet – but are not coming together structurally’ (PRIA).¹²⁴

Apart from taking individual cases through the Right to Information Act, PRIA had otherwise not taken up broader issues concerning older people, but they expressed an interest in whoever did.¹²⁵ “There is an issue but not an explanation for why nothing is happening”.¹²⁶ Older people were recognised as having an important role to play in governance, and the national PRIA organisation reported that they were looking to engage with them in residents' associations. Nonetheless, PRIA had taken the opportunity to include a session about ageing and older people at their international conference on social inclusion. Organised from their national and West Bengal offices with the University of North Bengal, the conference was concerned with addressing social exclusion as a significant part of development:

‘dealing with economic forms of injustices at one end [of a continuum] to socio-cultural forms at the other ... [including] deprivation from adequate standard of living’ (PRIA, 2009).¹²⁷

While proposed initiatives for other minority groups were presented in a context of developing citizen engagement in governance and rights to dignity, older people were

¹²⁴ Personal communication: Harsh Jaitli, PRIA 12 March 2009

¹²⁵ PRIA (2008) *Accessing Information under RTI: Citizens' Experiences in Ten States – 2008*

¹²⁶ Personal communication: Harsh Jaitli, PRIA 12 March 2009

¹²⁷ *Citizenship & Governance: Challenges for Social Inclusion* (2009). Conference briefing paper prepared by PRIA. Author not named.

however presented as those in need of a medical response and not as part of the mainstream of citizens (Chakraborti and Sarkar, 2009).

10.5 Concluding comments

Three areas of evidence have emerged from this part of the case study that may contribute to the picture of how and why older people appear to be invisible in the development discourse. There are no references to older people in the key development discourses to which the agencies in this study are working; there is an acknowledged lack of data about the needs and interests of older people; and there is uncertainty about how change might be effected in terms of both appropriate approaches and locus of responsibility.

Without exception, all the IGOs, INGOs and NGOs both documented and stated that their priorities and work programmes were framed by the MDGs and by Human Development. Though some were aware that the MDGs did not contain references to older persons, they all appeared to be unfamiliar with the concept that older people and ageing was an area for consideration in development. In spite of the GOI's own stated interest in older people and the professed acknowledgement by the IGOs that they developed their India programmes in line with Indian national policy, particularly the Five Year Plans (see Chapter 9), all conceded that they were doing very little either on ageing or for older people.

The findings indicate a mismatch between the acquisition and use of professional knowledge, and an individual's personal awareness of the circumstances of older people. Each tier of agency was aware that older people were being excluded from public policy and practice and each acknowledged that more qualitative and quantitative data was required to inform policy and plans. PRIA further suggested a research approach that would contribute to building an evidence base on the concerns and interests of older people. The agencies commented on the inadequacy of the available poverty data and lack of data for research and statistical purposes, suggesting that more detailed data disaggregated by caste, income, and gender would be helpful. The expressed interest in

data collection and its uses was however mostly confined to meeting the material needs of older people as a group of vulnerable people in need of personal care, care homes, pensions, and ration cards. There was little interest expressed in the broader issues of older people as citizens and valued participants in society or their communities. This was in contrast to the approach espoused by all the agencies in relation to other 'client groups', where policy-making and programming were designed on the basis of people's inclusion in society. The contrast reflects the normative position on older people as vulnerable people in need of care. As individuals, rather than as spokespersons for their organisations, all those interviewed displayed knowledge of the needs of older people and what is available for them within the Indian system but were not able to translate this into any form of activity within their institutional remits. As individuals they had each recognised that the traditional status and respect afforded older people was changing as a consequence of globalisation.

The gap between the individual and the organisational perspectives gives rise to a range of possibilities about why older people are missing in the discourse. While there was personal concern about the changing circumstances for older people, there was little sense of how they or their organisations might become better informed. Those speaking for the international government agencies expressed the view they did not feel well briefed by the NGOs on older people's issues and that the NGOs had a role in pressing the case of their constituents. They would like to receive more information briefings and short 'punchy' statements that would highlight critical issues and indicate desired policy directions (DIFD-I, 2009). All of the IGOs had commented in their work strategies for India on the need for further research into the circumstances of a changing ageing population, though not necessarily to be initiated by their own agencies. The NGOs thought that it should be the role of other NGO not theirs. While others expressed the view that responsibility for change rested with older people themselves. There was a distinct lack of responsibility for making change happen. Increasing knowledge does not however necessarily translate into action (Jones et al., 2012). The agencies working with older people, who felt that they were informing the IGOs and other NGOs stated that they

did not feel heard by either the international or national bodies (Chakravarty, 2009, HAI-I, 2009).

It can be seen from the findings that there is an awareness that the circumstances of older people are changing. There is acknowledgement that these changes need researching. But still there remains a lack of action. The main reason that has emerged has been the absence of references to older people in the international discourses: while the MDGs, social exclusion and women are made the clear priorities, the IGOs and INGOs are reluctant at best, to engage in an area of work where there are no requirements to be accountable. Several suggestions did however emerge about how change could be effected. The UNDP respondent commented that change would only happen, if there was agreement in policy-making at the top level in the UNDP. Similarly, when asked what would encourage the INGO to work with older people, it was suggested that reference would need to be included in the organisation's key strategic priorities for action. While the subject remained unspoken at senior levels, it was not going to appear in any meaningful form further along the system. Conversely the view was expressed by the West Bengal office that influences for change can be both bottom-up and top-down.¹²⁸ Finding a lever for change was a further suggestion for increasing older people's presence in the discourse. Using the pensions system as a significant pressure point in an economy would be a route to raising the profile of older people. This has parallels with the early stages of improving the position of women in development, when their interests were first raised as economic beings.

At this stage the findings indicate that the absence of references to older people in UN and DFID-I documents reflect the global discourse on development; and that when converted into development plans for India have resulted in a policy gap for older people, an acknowledged lack of data, and lacunae in where responsibility lies in addressing in meeting the changing circumstances of older people. The next chapter explores the impact of this policy gaps on local development practice.

¹²⁸ Personal communication Senior Research Officer, Development and Planning Department GoWB 26 March 2009

Chapter 11 Findings: the programme in practice

Chapter 11 examines the impact of the development discourse on older people within the case study programme, from the perspective of those working with local communities. The findings report on the data gathered from the workshop, a survey questionnaire, semi-structured interviews with CSSP grantholders, the programme director and members of the staff team of PRIA in Kolkata; and a range of informal discussions with representatives of CBOs at the international conference held in Siliguri in February 2009. Fourteen groups returned completed questionnaires, 13 were by email and one was delivered to the researcher on the day of the consultation event. Sixteen groups attended the workshop, of whom seven had completed the questionnaires. The responses are separated into three major categories: (i) the level of engagement that the CBOs had with older people; (ii) how the CBOs perceived the position of and role played by older people in society; and (iii) the different types of support available for older people. The analysis begins with a brief overview of the WBCSSP. The responses revealed a mixed and rich picture of the circumstances of older people, reflecting the balance of personal and professional knowledge, and experiences of the participants in relation to older people in their communities. A summary of the findings from the questionnaire responses can be found in Appendix 11.

11.1 Overview

The WBCSSP opened its call for expressions of interest and grant applications from CBOs in August 2005. There were no applications received from any groups working with older people, even though two of the CBOs stated, among their other areas of work, they worked directly with older people. There was no indication of the existence of older people in the programme, though some of the committee members were older people. There was no overt recognition of work being carried out specifically for the benefit of older people. However, further study revealed that while the project-holders had not expressed an interest on paper in older people, several of them were addressing issues relating to them. PRIA's Programme Director in Kolkata stated that it had not been an

intention of the Programme to exclude older people and he was sure that they were part of some activities. He commented that food security projects, for example, would look at how everyone in a community -children, adults and older people - would gain access to food. He added that there were secondary benefits of food security programmes too: enabling younger people to remain in the community increased the likelihood of support for older people.

‘We are not old people friendly. It’s a romantic notion that they are looked after. [There is] not much of geriatric clinics in West Bengal. Some of the partner organisations do something to help. [I don’t] see an attitude change to old people. It’s a competitive world for jobs ... the shift is among the young’ (PRIA – Kolkata, 2009).

As part of the programme management, PRIA was required to monitor the programme using DFID’s-agreed log-framework. PRIA had developed additional monitoring frameworks for the CBO grantholders, to meet the main focus of the organisations and to reflect the WBCSSP work themes. Each theme in turn had to address the different marginalised groups, namely Muslims, Women, SCs, STs and Other Backward Classes. Working with people with disabilities was a themed category of its own. The information collected was aimed at finding out whether people were receiving work cards, ration cards, micro-health insurance or employment days, under the NREGA. The monitoring proformas did not include a requirement for recording information by age. The WBCSSP grant-holders would thus only know how many older people were benefiting if their record keeping indicated take-up of food rations cards¹²⁹, and the old age pension. Other than these elements, the PRIA respondent from Kolkata noted that old people were not covered by the programme. The Director of the WBCSSP noted that it was not possible to change the parameters of the Civil Society Programme. It had been contractually agreed with DFID, and as the programme was due to finish in a year it would be too late to start re-negotiating the terms. However, the Director noted this would not prevent PRIA as the managing agent from encouraging its project holders to do something about old people, although they would not be able to include this in their assessment framework.

¹²⁹ All adult members of a household are entitled to a claim a weekly allocation of limited foodstuffs and kerosene on a family ration card

11.2 Engagement of older people in WBCSSP

The completed questionnaires showed that a majority of the grantholders were engaged directly or indirectly with older people (see Box 7). Three of the 14 respondents categorically reported that they had no knowledge of the circumstances of older people in their communities. The research revealed three different levels of engagement with older people. Two of these were intended: first, involving older people as contributors and second, engaging with them as beneficiaries. The third area related to the unintended consequences of the programme in which older people indirectly benefited from the programme.

Box 7 Summary of grant holder engagement (self-defined) with older people

Of the 14 completed questionnaires:

- 4 said they were directly engaging in activity for old people
- 7 said they were indirectly doing something for old people
- 3 organisations reported that they unaware of circumstances of older people in their communities

The reasons respondents gave for engaging with older people were varied. They ranged from a sense of personal duty to a public responsibility, and from valuing what older people would be able to give, based on their life experiences, to a desire to include older people as equal participants in programmes for change. One respondent expressed the view that it was not just about getting contributions from old people, but also about creating an environment in which care and respect were to given to older people in both the family and public sphere. The respondent suggested that this could be achieved through “sensitisation or awareness programmes”. One of the informants from the WBCSSP funded projects interviewed gave two reasons for his interest in older people. First, was an acknowledgement of the contribution older people have already made to society and that they should be recognised for this. The second point was concerned with the macro affects of ageing populations. As one respondent commented: “If we look at

the world holistically, we should see that numbers of older people are growing and that this needs looking at’.

Two projects reported in their questionnaires that older people were committee members of their programme and had helped develop the projects.

‘The programmes have just been initiated and older people are the most priority and will be .. encouraged to participate in [the] Civil Society Support movement’ (R7).

Another reported that it was already in the process of preparing a funding application to an Indian based NGO for work with older people.

There was a range of direct practical support offered to older people, which recognised particular specific health and social needs (see Box 8). These included making legal aid accessible to older people so that they could make representation to their local government body.

Box 8 Examples of intended, direct work with older people, reported by participants

- Support and advocacy for older age hand-rickshaw-pullers
- Advocating for food security for older people
- Providing free legal aid
- Health support to older people who are not receiving proper benefits
- Providing specialist eye camps in remote rural areas to carry out cataract procedures: “Without the operation it leads to blindness and becomes the burden of the family”.
- Arranging transport by speed boat for older cataract patients living in the Sunderbans¹³⁰
- Granny adoption programme

¹³⁰The Sundarbans are a part of the delta formed by the rivers Ganges, Brahmaputra and Meghna, in the Bay of Bengal. The tract reaches inland for 60-80 miles (100-130 km), much of it is made up of mangrove swamp

One interviewee offered an example of how a self-help group was supporting older people. At the monthly meeting of the group each member with enough resources would bring a cup of rice to distribute to the older members (mostly women) who had no other means of support.

Several respondents commented on the unplanned benefits for older people, arising from the WBCSSP funded projects. Some of these benefits are listed in Box 9. For example, while the mobile food dispensary had not been set up with older people in mind, older people who were residing with their families were reported as benefiting because of their additional food coming into the household. Likewise they were reported as benefiting if their children were successful in gaining a BPL card, hence increasing the overall family income.

Box 9 Unplanned benefits for older people – examples reported by workshop participants

- Strengthening self-help forums
- Working with biri-makers¹³¹
- Helping families obtain BPL (below poverty line) cards
- Providing protection for older people under the Lok Ayukta¹³²
- Providing mobile food dispensary
- Drawing on expertise of rural older people to set up adult education centres
- Engaging older people in campaigning
- Providing capacity building programmes: “which benefits people of all ages”

¹³¹ Biris, also spelled bidi or beedi, are hand-rolled cigarettes. Biri-making is often a cottage industry.

¹³² Lok Ayukta is the legal framework which seeks to ensure transparency and accountability in public administration and allows for investigation into complaints by citizens against public functionaries.

In addition to the material benefits that older people were perceived as receiving, they were also considered to be *of* benefit to the WBCSSP projects, because of their life experience and wisdom.

A number of respondents found that completing the questionnaire had stimulated them to think about other ways in which they could engage with older people in the future. Some examples can be seen in Box 10. One group said it would now be looking to include “Rights of the Old People” as an agenda item with their SHG networks and disseminate information about older people to local and State government institutions with whom they already had contacts. Those agencies already working with older people actively sought to include older people in their discussions in communities, not by stating that there was a problem but by exploring what people can and do bring to development, for themselves and their community.

Box 10 New ways of engaging with older people: responses from grantholders

Now we think to involve old people in WBCSSP directly. They can make a pivotal role in policy making’ (R12)

‘[Our]’ project would like more information about resources and technical support for elderly people’ (R9)

‘The project will address the needs of aged disabled people’ (R10)

‘[I am] glad to fill up the form for [the] encouragement of the older person in the WBCSSP programme’ (R11)

11.3 Perceptions of role and status of older people in society

All 23 respondents expressed a view or described an activity in which older people had a positive role to play in their communities. Older people were acknowledged as contributing to communities as members of NGOs and CBOs. Without exception though, all those in the workshop were aware of the public perception that young people in general did not respect the older generation. This was especially so if those older people were poor.

Comments about the positive and supportive role older people play related to their roles in both the public and private spheres. One questionnaire respondent stated that in their locality:

‘Most of the older persons were involved in the Sub Panchayat Committee as well as different CBOs. They instruct and suggest to the youth through discussion for village development’ (R11).

Other examples included: the contribution the older person makes to decision making in the family; providing knowledge and support in health awareness, especially in cases of maternity; “contributing to social governance”; sharing their experiences and knowledge in village level planning and their skills in social and community and community mobilisation; and generally “try[ing] to solve local level small problems”. The comment from Respondent 12 summarises the extensive contributions older people continue to make in the private and public spheres:

‘Many old people in our community volunteer some social activities like promoting adult education, community health etc. and give us a good idea and opinion to implement the projects. Here they spend most of their efforts and times to help their children do work freely. Indeed it is also a great contribution to families as well as communities as every child is a treasure of the community and would-be citizen of the next day’ (R12).

Older people were frequently members of the governing committees of CSOs, being drawn in to a wide range of issues rather than those concerned only with old age. Many of the groups involved in the CSSP were working on gender issues and the empowerment of women to enhance their role in their communities: “Old women always share their experience with the community: that helps the people to work better” (R1).

A further cluster of responses referred to the direct and supportive role older people play with their families and with grandchildren in particular.

‘Old people are integral parts of the family fabric ... If CBOs can be strengthened and ... can bring about some developments in the life and livelihood of the rural poor – the old shall not be excluded simply because of their age’ (Workshop participant).

‘Besides, in the families they are contributing more by giving care and affection to their third generations which help kids grow up properly’ (R12).

Some roles that older people were playing in their communities were going unacknowledged, but emerged in the context of intergenerational work where the young and old in the community were actively engaged in programmes to support each other.

Box 11 Intergenerational activities - existing examples reported by grant-holders

‘Young members of local clubhouses are providing volunteer support to bring patients to and from hospital for their eye operation’

‘Adoption of granny’ programme where the assistance of experienced aged grannies is being drawn on to support pregnant women and to train new mothers

“Grannies” conducting awareness programmes such as stopping child marriage, girl child discrimination and various types of superstitious beliefs in their society.

These projects were seen as being of mutual benefit to both generations, as they learned from each other to improve their lives. They were seen to be particularly important in situations where older people (usually women) either did not have children or were being neglected by their sons and daughters because there was not enough money in the household to support them.

The responses also recognised that older people were not being treated well in society. In addition to the positive roles afforded older people, a picture was presented of the difficulties they experienced in their everyday lives. One questionnaire response noted that ‘the worst sufferers are women, they worked hard when young and their income was meagre’ (R1). There were as many expressions of the material needs and hardships experienced by older people as there were examples of the contributions older people make to their communities. These were mostly expressed in relation to the difficulties in attaining BPL cards and pensions, and accessing health care, with specific mentions of eyesight.

11.4 Perceived sources of support available for older people

The overarching issues of concern that emerged from project holders about older people were in relation to poverty and health. The absence of a pension that was sufficient to

live on, the difficulties of claiming any benefits that were available and the high costs of health care were making it extremely difficult for poor families to sustain their older relatives.

‘In many cases it is found the old people in the communities, especially in rural areas, are not getting sufficient support. They are neglected and deprived of their own rights and needs. In poor families the older people are not getting due care and nutrition due to penury, despite having good intention of their children, and on the other hand they have no access to local panchayats to be provided with their social support like Old Age pension, special Ration Card for food security etc. In maximum cases they are ignored. Only their electoral power is being utilised during [the] election; but when [the] election is over their ‘electoral’ role is over and their demands are all damned’ (R12).

Described at the workshop as suffering from ‘social insecurity and food insecurity’, much of the discussion about older people concerned the lack of health care and specialised care for older people. Medicines were costly; doctors did not make home visits, and it was too expensive to visit a doctor. If people continued working in strenuous jobs, such as rickshaw pulling, until very late years, their health was even worse. If they left to do something less strenuous they needed to be re-trained but were deemed to be, or possibly were, too old to learn new skills and in any event there were no resources to provide the training.

In relation to their entitlements some knew of the old age pension and one person at the workshop was aware of the Maintenance and Welfare of Parents and Senior Citizens Act 2007 (see Appendix 12). However almost all commented that there was insufficient information and practical support available for older people in the community, as indicated by the following quotes.

‘Most of the old people [are] not aware about their rights towards the various Government Schemes such as old age pension and rationing system’ (R4).

‘A local mother’s group looks after health matters of older persons’ (R11).

There were some specific responses in respect of specialist areas for support. In the case of the CBO supporting prisoners, they found that: ‘Young prisoners take good care of

elderly prisoners' (R5). Another questionnaire respondent highlighted that involvement in religious activities was a source of support.

A number of themes emerged from the workshop and the questionnaires which provided a broader picture of the context and the lives of older people. These included the ability of older people to access the benefits and government schemes to which they were entitled, the differing impacts of urban and rural life on the wellbeing of older people, earlier employment and income opportunities, and social isolation. Participants noted, for example, that older people in rural areas fared better than those in the cities. At a very practical level, one person highlighted that “travelling in areas of West Bengal is very difficult, especially for old people”. Another participant commented that from his experience he found older people suffered more in urban areas, because of family migration, and in consequence had to go into residential homes. Other difficulties associated with urban-living emerged in relation to being part of an unorganised urban labour force where there were no benefits for older people: “Older hand-rickshaw-pullers are homeless and live by begging”. Workshop participants were sensitive to the isolation and marginalisation that older people experienced. One participant talked of an older person they knew who did not have the resources to attend a funeral and had thus been excluded from family matters. Another participant referred to how older people belonging to scheduled castes and scheduled tribes were deprived even from entering the temple and asked to sit separately – thus adding to their isolation.

11.5 Concluding comments

There was a common recognition among most of the interviewees that attitudes towards older people in India society were changing. The work undertaken by the CBOs in respect of older people, both for WBCSSP and in their work beyond the scope of the Programme, was nonetheless limited. Where the groups were contributing to meeting the needs of older people as part of the WBCSSP the work was mostly incidental rather than planned, and focused on the take-up of welfare benefits and pensions as part of wider benefit take-up programmes. The limitations of the CSO's direct engagement with older people could be attributed to their lack of understanding about the day-to-day

circumstances of the lives of older people, a lack of knowledge that there were benefits available for them, and a sense that if there were a real issue to be met that the IGOs would be developing programmes and activities.

The visibility of older people was also absent in the documentation from the CBOs in the case study. Most of the WBCSSP programme was concerned with addressing the marginalisation of specific social groups. Discussion in the workshop revealed a range of definitions of what constituted marginalisation, from economic hardship in which people had neither food nor shelter, to exclusion from social engagement in society at large or from within their own communities. In spite of the lack of engagement by the international policy makers and funders of the WBCSSP, older people had some visibility in the projects on the ground. By both design and default they were included: through direct engagement in the projects which they had helped design, as default beneficiaries (through receipt of pensions); and as contributors within their communities and their families.

Reflections on the range of activities being carried out by WBCSSP projects revealed the potential for including the interests of older people without the need for resource intensive programming. Despite the life skills and experience suggested by the many different activities with which older people were engaged, such as mentoring and caring the respondents had not seen these skills as something to be made use of by the older person to help them build a more fulfilling life. Learning from the intergenerational activities, for example, could be brought to bear to other areas of support for older people. Older women could be invited to take part in the women's empowerment programmes. This could help build their confidence to increase their status in their own communities in enabling them to access pension and benefit entitlements. Income generation schemes and income enhancement schemes could be made available to older people. CSOs that were involved in making the NREG more broadly accessible could also include older people in their campaigning. As noted, the evidence from the planned and unplanned work with older people indicates many different roles that older people

play (as members of management boards, carers, volunteers and mentors to younger members of the community).

All informants proclaimed the family as being the backbone of support for older people in both the private and public sphere. Each also acknowledged that as a result of globalisation the family structures, 'traditional' status and respect afforded older people was changing to the detriment of older people.

Summary of Part IV

The aim of the case study was to explore the role and influence of the international development discourse on local practice in relation to older people in an LDC, with a view to expanding the understanding of how older people represented. It was not the aim to provide a critique of the strengths, weaknesses or particularities of how India responds to the interests of its older population. As well as illustrating how the representation of older people in the development discourse has impacted on practice on the ground it has also provided insights into factors which both inhibit engagement with older people and which have the potential to influence change in policy and practice.

In summary the research showed a consistent absence of reference to older people in the documentation from all tiers of agency involved in the CSSP, and how older people had been ignored in programme planning by non-age specific agencies working in international development. Older people were not targeted as beneficiaries of resources or services, their voices rarely sought as contributors in identifying either their needs and interests or those of the community at large, and that they were, at best, secondary players, who in some instances were the fortunate recipients of unintended consequences, such as the BPL benefits. These findings suggest that the interests of older people were routinely subordinated in policy making and grassroots practice to other international targets.

A number of factors have emerged that contribute to an understanding about why older people have been consistently excluded in the development discourse. The contextual framework showed that global development discourse and current international policy priorities, such as the MDGs, Human Development and Human Rights are directing the work priorities of the IGOs. None of these, as has been shown, notes the interests of older people. The social policy issues of gender, marginalisation, poverty and inclusion which dominate the discourse of the international agencies likewise demonstrated little regard for older people living in India, (and this was despite the stated commitments by the Indian government and the evidence on the ground from the CBOs). All the informants acknowledged that their respective organisation was doing very little, if anything, for older people. When informants did acknowledge the interests of older people the emphasis was on welfare and care. DFID appeared not to be aware of the local reality that older people were both potential beneficiaries of and contributors to WBCSSP. Had they been DFID may have identified them as potential programme beneficiaries alongside the other social groupings at the outset. The research has shown that marginalised groups have been consistently integrated into policy priorities, or been part of specialist programmes to enhance their ability to contribute to and benefit from development, as seen in the WBCSSP. The interests of minorities based on gender, race, religion, culture women, have all been acknowledged in the documentation from all the different agencies involved in the case study. There is an agenda of inclusion that seems to exclude older people.

All informants in the case study indicated that there was scope for action or change with and on behalf of older people. The WBCSSP project holders and the management at PRIA in Kolkata acknowledged gaps and were positive about taking further action in relation to older people. They made suggestions for change which would include reviewing organisational behaviours and practices, gathering information at the grassroots about older people in their communities, carrying out advocacy work with local government bodies and encouraging the development of older people's pressure groups (see Appendix 12).

The final chapter, Chapter 12, brings together these empirical findings and those from the discourse analysis; it draws out some common themes and presents a conceptual framework for considering how the interests of older people can be better incorporated into development discourse and practice.

PART V Drawing the research together

Chapter 12 Discussion and analysis

She had never dreamt that as soon as her husband died her own sons would become her enemies...It was unbearable to her proud nature to live like an orphan, eating what she was given, in a house where she had no status and counted for nothing. But what else could she do? If she lived apart from her sons, whose reputation would suffer? (Premchand, 2008:180).¹³³

12.1 Introduction and overview

Premchand's depiction of the elderly widow in the above quote captures the reality of day to day life for millions of older people living in circumstances in which they have neither status nor support. The story was written nearly a hundred years ago: the myth that the family always supports their older members has a long history (Hashimoto and Ikels, 2005). The situation of older people in the family was not formally presented as a social problem though, as Premchand indicates there have long been problems between generations, and older people have not always commanded the respect that is so often ascribed to them. This is further endorsed in the literature discussing changes in intergenerational relations (Vera-Sanso, 2004a, Aboderin, 2005, Alam, 2007). In the light of the evident gaps in support for older people this thesis has sought to investigate how older people have been and are represented in the development discourse, and has examined the impact of that representation on development practice. A multi-disciplinary research approach, described on pages 18-19, was taken to add rigour, texture and depth to the enquiry. The significance of the research findings is discussed below. Other points relating to the theory and methodological approaches used in this study are also addressed.

¹³³ Premchand, M.(1880 – 1936), *A Widow with Sons* from *The Co-wife and Other Stories* pubd Penguin, New Delhi 2008

Part I reviewed the available literature on older people and development and found little that directly addressed the interests of older people within development. However there is an increasing body of literature on social protection and health care of ageing societies. Part II presented the theoretical framework for the research. It looked at the ways in which a particular discourse can maintain and reinforce a dominant position in society through its influence on policy making and the ‘apparatus of control’ deployed by institutions, including regulations and laws, technocratic instruments, such as UN declarations and monitoring, evaluation and assessment processes (Hall, 2001, Chambers, 2004). A review of the progress of the women and development agenda was presented as an example of how a discourse may change and adapt over time. Parts III and IV sought to bridge the gap between discourse and practice, by undertaking a content analysis of a corpus of UN documentation and a case study in India.

My research illustrates that despite the changing representation of older people within a series of targeted UN programmes over the last 25 years, the dominant development paradigms are not being interpreted and translated into practice for older people in the ways they are for other population groups. I have provided evidence (see Sections 7.3 and 7.4) that older people have had little or no acknowledged role to play in development, and that development remains oriented towards women and children, with its programmes in education, skills training, maternity care, health and the prevention and management of infectious diseases (UN, 2000, UNDP, 2003, UN-DESA, 2005). The case study illustrated how the absence of any reference to older people in the development policy discourse had a direct impact on local development practice in both the short and long-term. In the short-term older people were excluded as beneficiaries from the programme and no efforts were made to enable them to access benefits along with other groups in the community. In relation to the longer term there was no scope for gathering data about older people that could inform long-term policy and practice regarding older people.

Overall the research shows that older people are largely invisible in policy documents and programme objectives in the development discourse: their status and role

unrecognised and their needs rarely acknowledged. The review of key global events and declarations in Sections 7.3 and 7.4 illustrates the paucity of references. The findings have brought into sharp relief the contrast between those who are privileged in the development discourse and practice and those who are not. The research also indicates the difficulties of bringing older people on to the development agenda. The technocratic tools of influence and control, such as the UN International Plans of Action and summit declarations on ageing offered by the UN do not appear to be influencing the approaches and practices of key bodies engaged in international development. The review of gender and development demonstrated some of the ways in which it has entered the development discourse, while indicating some of the gaps in practice on the ground. Finally the case study illustrated some of the difficulties in assessing the relationship between local practice and global discourse.

Table 31 Research questions

	Research Question	Planned Evidence Search
RQ1	How are older people represented in key policy discourses on development?	What the key development theorists, IGOs and INGOs are saying about older people in their reports and conferences.
RQ2	How has their representation changed over the last 25 years?	Evidence of changed language use and incidence of reference to older people by IGOs.
RQ3	How has the representation of older people in the discourse affected practice on the ground?	How organisations talk about what they do, what influences their policy and practice.
RQ4	Are there factors inhibiting engagement with the interests of older people, and if so, what are they?	How older people are referred to, understanding of needs of older people, organisational constraints.
RQ5	What factors would influence a positive change in policy and practice for the benefit of older people?	How change is taking place for other groups, such as women; practical examples of change from the grassroots
RQ6	To what extent is it possible to establish a connection between global discourse about older people and local development practice?	Knowledge of international initiatives on older people, iterative learning mechanisms

Chapter 12 consists of three sections. Following this one, section 12.2 discusses the findings relating to the six research questions posed at the start of this research thesis

(and presented again in Table 31), drawing on the literature, discourse analysis and case study. Section 12.3 builds on the findings of the research and offers a new conceptual framework of how the interests of older people could be addressed in international development.

12.2 Key findings by research questions

RQ1 How are older people represented in key policy discourses on development?

Three clear features emerged from the research in terms of how older people are represented in the discourse. First, there was an absence of older people in the discourse, demonstrated by the very few references to them across a wide corpus of texts that I examined, for which the results can be found in Chapter 7. Second where older people were represented, the image was generally of people who are vulnerable and in need of support. And third there was some confusion in the definitions of older people as used by different agencies working in development.

The literature review revealed few published texts in the fields of development and gerontology over the last fifty years concerned with an inter-relationship between the two disciplines. While there is a growing body of literature on *ageing* in developing countries, it has tended to focus on specific issues, such as social protection, and with few exceptions (Neysmith and Edwardh, 1984, Randel et al., 1999, Lloyd-Sherlock, 2010) has not addressed the role of older people as a topic within international development thinking and practice. With the growing awareness and acceptance that development was not succeeding in raising the quality of life of persons living on less than a US dollar a day, of whom 100 million were older persons, a new pro-poor paradigm was introduced into the field of international development (Engelman and Johnson, 2007). There was no mention of older people in any part of the documentation that emerged from the Millennium Summit in 2000, nor has there been any since the follow-up review meetings. Older people were also seen to be absent from the changing approaches in development, such as human development and human rights. The results of the content analysis of the Human Development Reports and Right to Development Working Group showed a near

invisibility of older people, compared to women (see Appendix 4). Where attention was paid to older people in international declarations, it was mostly in the context of their being vulnerable adults (see Section 7.3). The greatest level of interest in older people and ageing issues during the heyday of the 1990s summits concerned with social development, came from the World Bank and not those bodies, such as UNDP, whose expressed concern was with the rights of individuals, the quality of life and wellbeing, (World Bank, 1994). This is not a surprising finding given the economic hegemony in development and a growing concern about the long term financing of an ageing population and the fiscal sustainability of pension systems (Holzmann and Hinz, 2005). It is the contrast with the lack of interest espoused by the other agencies that heightens the systemic invisibility of older people in development. The hegemony of western economics in development deprives older people of status because of their perceived lack of economic value, and the inability for such an approach to differentiate between group interests (Vavrus, 2002, Tsikata, 2007).

The most common representation of older people revealed in the case study, as I demonstrated in Chapters 10 and 11, was of them as victims of abandonment - by their families, by society and by the Government. A common view expressed by all informants in the case study was that young people did not in general respect the older generation, especially if those older people were poor (see Section 11.3). These two positions (abandonment and lack of respect) contrast with the West's view that older people continue to be cared for by their families, are revered by society and are not in need of state support, (Nasreen and Togawa, 2002). Nasreen and Togawa (2002) noted that families were often too poor to provide care, and that while the Government was providing legislation to support older people it was not leveraging resources to make change happen. In the main the few responses by the IGOs on older people focused on their material needs. The CBOs in the case study provided several examples of how older people contributed to society, such as mentoring young women and being repositories of knowledge and experience that could be drawn on to help with developing new activities (see Section 11.5).

The findings from the discourse analysis indicated confusion across the UN's agencies in whom they regarded as older people. This was manifested in how the terms ageing and older were sometimes used interchangeably. For example, as I show in Section 5.1.2 although policy documents from both WHO and the ILO recognise how life events and circumstances contribute to old age, neither agency had directly engaged with issues concerning older people themselves and were using the terms older and ageing synonymously. Some of the respondents in the case study had also noted the existence of such confusion, suggesting that it be acting as a possible block to progress. The implications of such lack of clarity in language use are discussed more fully in the response to RQ4 below, in the section on methodology.

RQ2 Did the representation of older people change between 1982–2007?

Several discursive shifts took place over the 25-year period in those areas directly concerned with older people. These were evident in the GA resolutions and the International Plans of Action and are described in Section 7.1.4 and 7.2.5. The changes from the IPAA to the MIPAA reflected the changing paradigms in gerontology, including the growing focus on the wellbeing of older people, on active ageing, participation and the positive contribution of older people to society, and a shift away from pathologising older people (Jeune and Christensen, 2005). References to the quality and nature of intergenerational relationships changed from the 1982 Action Plan to the Madrid Plan of Action in 2002. Significantly MIPAA indicated that both young and old were capable of being mutually benefiting from and contributing to the relationship. Of particular note was that older people came to be seen as also having a role to play in development.

The changing nomenclature from the abstract term of 'the elderly' to the use of the term 'older people' indicated awareness that older people are individuals and not an amorphous, homogeneous mass. This has implications for policy responses seeking to meet a multiplicity of individual and collective requirements. The four overarching perspectives on older people, I identified from the Madrid Plan of Action (see Section 7.2) acknowledged that older people are more than their social or economic value. While they are needed and have needs, they also have aspirations and a right to exist without

requiring an identifiable role to justify their existence. Although similar analyses have been evident for many years in the development discourse, relating to participation, inclusion and human development of different groups (Cooke and Kothari, 2001) this research showed no evidence that such analyses have extended to older people's role in international development.

The representation of older people in wider development discourse has remained substantially the same over the 25 years. All documentation and commitments agreed by the UN since 1971 that have been dedicated to ageing have sought to encourage the different agencies and funds of the UN to incorporate 'ageing issues' into their policy and programming. However the evidence from this research shows that these have yet to have an impact on the development discourse. The content analysis of the UN corpus in Part II showed that at key points between 1982–2007 there was little interaction or absorption of ideas or commitments by the non-age specific agencies and funds. The 1993 World Summit on Human Rights, for example, made only one reference to older people; and the 1994 Conference on Population and Development (ICPD) focused almost exclusively on reproductive and child health. There were several other 'green lights' to action: from the Copenhagen World Summit on Social Development in 1995, IYOP in 1999, the MDGs in 2000, the MIPAA 2002, the World Summit Outcome 2005 and the mid-term review of the MDGs in 2007. The most critical point, as this research has repeatedly shown, was the failure of the Millennium Summit at the turn of the 21st century to include any targets relating to older people.

In summary where older people have been the focus of an agenda, such as the International Plans of Action, their representation has seen positive changes. The perception of older people in the non-age related policy and practice discourse has however remained fairly constant, with little evidence that their status in society has improved or that they have a role in international development.

RQ3 How has the representation of older people in the discourse affected practice?

The consistency of evidence suggests that the prevailing international development discourse has impacted on policy and practice in relation to older people. This section presents data from both the case study and discourse analysis that verifies this linkage. It is however difficult to identify the degree to which the international discourse has affected local practice (Seshia and Scoones, 2003). The inherent limitations in demonstrating the direct causality between the discourse and practice are thus also noted to inform future research in this field.

The clearest evidence demonstrated by this research, of the link between the international discourse and its impact on local practice can be found in the construction, funding and implementation of the WBCSSP. A linear connection can be traced through the research framework (see Figure 4 page 202). The development priorities for DFID, the initiating agency of the programme, were driven by the internationally agreed MDGs and Human Development Reports: the current dominant development paradigms (see Section 10.3). In its 'in-country' programme (in West Bengal) DFID adopted an approach to alleviating poverty by seeking to improve local participation and inclusion of minorities. The absence of any reference to older people in the MDG targets coupled with the normative lack of recognition of older people as a marginalised group (see Sections 5.1, 7.3 and 7.4) can safely be said to have contributed to their not becoming part of the WBCSSP. Evidence from the study showed that there were some planned interventions for older people, although older people were rarely the primary beneficiary, as I show in Section 11.2. The case study provided a clear example of how the unplanned exclusion of older people in a funding programme indicated to potential applicants and to the eventual grant recipients that the funder was not interested in that subject. The impact of the global discourse on local practice was four-fold. First, older people were not supported in accessing local benefits. Second, their interests and needs were not represented to local government. Third, the absence of a mechanism to record unintended consequences prevented learning from the grassroots that could inform long-term policy and improve performance-based funding and practice (van Kerkhoff and Szlezak, 2006); and fourth it served to reinforce myths held by IGOs, that in the absence of any information about

older people, any needs that they had were being met by their families (Okoye, 2005, Alam, 2007).

The ICESCR Shadow Report for India (see Section 10.1.3 above) produced by ActionAid India provided an example of how a discourse analysis of a text can be used to identify how the international discourse affects development practice. Produced by a collection of NGOs, the Shadow Report simply mirrored the 1966 ICESCR, and as this had not referred to older people so the NGOs followed suit (ActionAid India, 2008b). The absence of any Articles referring to ageing meant that those who produced the Shadow Report were not minded to comment on the situation of older people (see Sections 5.1 and 10.4). Analysis of the case study-related documentation revealed that none of the key agencies had dedicated programmes for older people or could show that the interests of older people had been integrated into their other activities, see Table 30 p240. The omission of older people in the documents from PRIA, the managing agent for WBCSSP, was perpetuated in the documents produced for the WBCSSP: they too failed to consider issues relating to older people.

The difficulties in assessing a causal link between the international discourse and local practice arise because, as Burman (1996) notes, the social, economic and political context is complex with many influences at work. Factors ranging from macroeconomic policy to knowledge of current of kinship relations between young and old, from the delivery of national priorities, such as improving democratisation in India, (see Section 9.1) and an ability to respond to processes for change (such as countering DFID's monitoring criteria, see Section 11.1), can be seen to have impacted on the relationship between the global and local (Grindle and Thomas, 1991, Gilbert and Gilbert, 2004). The discussion on critical discourse theory in Chapter 3 noted that consideration needs to be given to not only what is present in a discourse, but to the silences and the surrounding context of that discourse too (Huckin, 2002). Section 7.4.1, for example, notes that in 1999 the Right to Development Working Group highlighted that it would work on three basic rights: the right to food, to primary health care and to primary education. There was nothing overt to suggest that older people could not be included in the first two of these. However,

following the history of the discourse would suggest that the intended audiences were women and children. This was borne out in the texts from Working Group meetings in which older people had been ignored, with one exception in 2002, while there continued to be references to women and children. A clear visual representation of this can be seen in the word frequency analyses of the WDRs, HDRs and RtD Working Group papers in Appendix 4.

With only a few CSOs working directly with older people there is limited scope for influencing IGO priorities. The interests of older people are thus doubly impaired because the agencies are omitting to fund the very bodies that would be able to influence their priorities. Although the WBCSSP is a single example of an inter-government relationship, it does illustrate how the failure to either highlight all marginalised groups at the outset, to take a broad definition of marginalised groups or to record unforeseen consequences of a programme directly militates against the inclusion of a section of the population. To quote Ferguson (1994)

It may be that what is most important about a 'development' project is not what it fails to do, but what it achieves through its 'side-affects' (1994:180).

The 'age-blindness' demonstrated in the case study both denies the presence of older people as having needs and perpetuates a perception that older people are being cared for by their communities. This is counter-productive to meeting both the immediate and long term needs of older people.

RQ4 What is inhibiting engagement with the interests of older people?

This research indicates that the invisibility of older people is, to paraphrase Alnoor Ebrahim (2004) both the result of planned structures and a series of chances. Limited research and investment in older people's issues, an absence of global support mechanisms, and policies that are counterproductive to the interests of older people are contributing to reproducing existing institutional structures. Six main issues are identified as constraining progress on an ageing agenda. The first four are broadly concerned with planned structures and address: (i) the prevailing development paradigms (ii) conflicting policy narratives, (iii) a limited knowledge-base about older people, and

iv) methodological inhibitors. The final two areas reflect a combination of ‘chance’ and strategy which are both vital for pursuing innovative paths and solutions to change. These final two inhibitors are a voiceless constituency and an absence of a theory base. Each of the six points is discussed separately below.

(i) Development Paradigms

The paradigm shifts over the research period have provided neither a role nor a place for older people in international development. As I have shown in Sections 1.3 and 2.2, the development paradigms of the last 30 years with their focus on productivity, economic growth, human development and human rights have played a major role in influencing the perceptions of the value of individual persons. The post-2000 new poverty agenda which, as Green (2002) notes, acknowledged that social exclusion and disempowerment are as much a part of being poor as living below the poverty line was silent on the subject of older people. This is evidenced in the absence of any reference to older people in the MDGs, (see Box 1, Section 5.1.2), and by the discussions held with the case study IGO and CSO stakeholders (see Sections 10.3 and 11.4). The primary focus of human development on training and skills for employment and a defined retirement age of 60/65 years, formalise a position that older people are not worth investing in, because they are perceived as having little formal economic value (Holzmann and Hinz, 2005). In relation to pursuing a human rights agenda the IGOs appear to have adopted the utilitarian position favoured by the economic and human development models, rather than a position that recognises social value (Green, 2002) hence reinforcing a reductionist view of older people (Engelman and Johnson, 2007).

The absence of international instruments, such as monitoring and evaluation processes and the silence in international declarations about older people and ageing (see Chapters 5 & 7) means there are no reminders or imperatives for policymakers and funders to consider older people. The pursuance of programmes, such as the MDGs, that fail to address the interests of older people, directly act on national and local development policies and projects by failing to make available financial and other resources that could support other locally defined initiatives (Chambers, 1997, Ebrahim A., 2004). Many of

the mechanisms for affecting change, such as funding and programme evaluation criteria, directly reflect the dominant discourse, resulting in a possible narrowing of interests at the expense of other groups or activities (Naidoo, 2009).

The impact of the development paradigms is manifested in many of the technocratic tools that have been developed to translate the discourse into practice. The ‘Poverty and Social Impact Analysis’ (PSIA) and ‘Poverty Impact Assessment’ (PIA) toolkits, for example, developed by IGOs for analysing the distributional impacts of policies, fail to acknowledge the existence of older people. The series of international meetings concerned with aid effectiveness, until as recently as 2008 in Accra, make no reference to older people, in spite of acknowledging women in development and confirming accountability criteria to ensure gender equality (see Section 5.3). Disappointingly, there has also been a consistent failure by IGOs to use the wider knowledge they acquire from different development programmes for the benefit of older people, demonstrated by the analysis of UNFPA and UNDP (see Chapters 3 and 7). Such absences in the mechanisms for measuring and evaluating progress in development consolidate the invisibility of older people and reinforce the hegemony of the IGOs. As Hall (2001) suggests, the unwillingness to find out is tantamount to a withdrawal of knowledge, depriving other actors in development of the opportunity to learn from or discuss the interests of older people.

The aims and approaches of the WBCSSP mirrored these development paradigms and approaches. All the agencies whom the researcher interviewed recognised a changing reality for older people, which was at odds with the mainstream discourse. And although the CSOs and CBOs who were involved in the WBCSSP made no mention of external influences their actions were, in this instance, directly influenced by them because DFID had established the funding and support parameters for the project (see Section 11.1).

(ii) Conflicting policy narratives

Three parallel policy narratives emerged which are inhibiting engagement with older people. They reflect the interplay between international and national policy priorities, the

different perspectives on where older people fit into these and the possible locus for applying leverage for change. Identifying these narratives has helped to understand how different actors help create the silence concerning older people. The three narratives are: a western perception of ageing and older people in LDCs; an unexplored gerontology relating to development; and social inclusion. There are overlaps between the three, but each has its own dominant theme.

A western policy narrative on the position of older people in LDCs is dominated by one in which older people continue to be cared for by their families, are revered by society and are not in need of external support (Nasreen and Togawa, 2002, Vera-Sanso, 2004b, Aboderin, 2005). Acceptance of this myth inhibits exploration of the interests and needs of older people. Although the international agencies examined in this research professed to be working to India's policies for social development there was no evidence that they had pursued India's policy on ageing, or had taken account of older people as part of programmes concerned with marginalised groups. Despite the prevailing narrative they did acknowledge that families were actually too poor to provide care, and that although the Government was providing protective legislation for older people it was not leveraging resources to make change happen. A substantial reason for this, as I commented on in Section 1.2, is that older people compete unfavourably for national resources in LDCs where there is an emphasis on child mortality, education and training (Engelman and Johnson, 2007, Holzmann and Hinz, 2008). If the IGOs and INGOs engaged in development are unwilling, in their role as partners, funders, or supporters, to present a narrative that includes the interests of older people, then those working at the grassroots will find it harder to take action because of a lack of resources and funding, and of modelling from others.

Western perspectives dominate the literature in gerontology. In consequence the West's possible solutions to a global ageing society remain dominated by western thought, and driven, as I indicated in Chapters 1 and 2, by models of economic independence (pensions and insurances, for example), welfare (health and care) and successful ageing (satisfaction, good health and longevity). These theories are of limited direct value to

LDCs still unable to afford adequate state and private pensions and public services, and where people are obliged to carry on working for as long as possible. Continuing family support appears to be the perspective that IGOs and INGOs perpetuate in their policy-making - despite evidence to the contrary and the guidance of the International Plans on Action on Ageing (UN-DESA, 2002, Okoye, 2005, Alam, 2007).

Globalisation emerged as the current locus of attention for western gerontologists interested in global ageing, primarily from a political economy of ageing perspective (Deacon, 2000, Phillipson, 2003, Walker, 2005). While there is a structural logic for this in the context of the global inter-government initiatives such as the MIPAA, criticism is levelled by both the West and LDCs of the usefulness of this approach to LDCs. Chakravarty (2009) and Powell (2010), for example, both argue that the political economy approach is inappropriate for LDCs because the state has not been in a position to direct or support public service initiatives and is unlikely to afford to provide services for their growing ageing populations. Such affordability is however contestable and it is argued that some LDCs are economically strong enough to provide services (Lloyd-Sherlock, 2010). Eyesemitan (2002) and Molzahn (2010) further argue that there are essential differences in quality of life criteria between the countries of the North and South, particularly in relation to the relative importance afforded to independent living and community support, which make the transfer of western approaches to countries of the South inappropriate. Independent living, for example, is not regarded as a desirable goal for old age in countries of the South (Eyetsemitan, 2002) and yet the discursive shift in attitudes to ageing in the international ageing summits have been reflected in policy outcomes designed to encourage more independent living by promoting active-ageing, private pensions and insurance schemes.

An emphasis on marginalisation and social exclusion was evident from the documentation of all the agencies in the case study. The WBCSSP sought to offer a means of combining progress in both political and social inclusion for marginalised groups. Scheduled Tribes and Castes, for example were enabled to access all available State benefits through direct support of the CSOs. This improved their material

wellbeing and enhanced their capacity to engage in society – opportunities, referred to in RQ3 above, which had not been made available to older people. Equating inclusion with the provision of support, advice or income does not however, as Sircar (2009) commented, necessarily make them part of society. As I indicated earlier in Section 7.2 where I identify the four-fold needs and interests of older people, inclusion in society is larger and more meaningful than ensuring an individual's physical wellbeing (Green, 2002). This has implications for policy approaches in furthering the interests of older people. It may assist IGOs move from their traditional perspective on older people as vulnerable people in need of institutional care (as expressed by the IGOs in India –section 11.3) to more community-based and user-informed responses.

The views expressed by the case study interviewees from UNDP, DFID, and the GoWB combined traditional perspectives on the role of older people with a reluctant awareness that changing economic and social structures were having an impact on the daily lives of older people, as well as on the young (see Sections 10.2-10.4). They stated that old people were not a priority, that more needed to be done and that conscious efforts were needed to ensure that the interests of older people would be met. Recognising India's own policy responses to an ageing population and its marginalisation narrative provides a potential framework for development agencies to incorporate this increasingly economically and socially marginalised group into programmes targeted at minorities.

(iii) Knowledge base of older people

The case study demonstrated a marked absence of informed knowledge about older people at all tiers of agency. Respondents were unaware of existing information and policies relating to older people, they expressed uncertainty about how to respond to different groups within the older population, and did not appear to know how to become informed about older people. Individually respondents recognised that conditions for older people were changing and that family support systems were weakening. Despite this and the acknowledgement by all informants that the interests of older people needed to be addressed there was no evidence that either they or their respective agencies were actively seeking to find out more about older people's circumstances. The CBOs in the

case study, who were engaged with older people, also did not suggest a readiness to engage with the broader agendas of older people's wellbeing or role in their communities that are covered by MIPAA (see Section 7.2).

There was a lack of awareness among those working in the international agencies in India of the summits on ageing or of the learning resources available to them to pursue programmes on ageing. Of course it can be argued that even when known, the content of global statements and their relevance to local conditions can feel too far removed to be meaningful for national and local and policy and practice. This is a case made by Unterhalter et al's (2008) study of education in Kenya. An interviewee from DFID indicated that the provision of information about a need was insufficient on its own (see Section 10.3): agencies need to receive guidance in understanding the issues relating to older people, and on the alternative ways of addressing them. The situation was described as complex. It is made harder still for agencies when they are working in an arena which is still struggling to establish a clear theory base itself (Johnson, 2005). Gerontology has also yet to explore where its interests lie in international development, whether, for example, in economics, social policy or human rights. This is discussed more fully in Point vi below.

Definitional arguments about who is an older person were sometimes raised as an issue but it was not one that appeared to influence practice. Only one IGO presented the definition of an older person as a reason for not engaging with older people's interests. There were reminders from different elements of this research about the heterogeneity of older people and the need for knowledge on how to respond to the interests of different sections of the older population, such as the young-old, the old-old, different marginalised groups, including urban and rural poor older people (though not older women). As Lloyd-Sherlock (2010) has commented, the life experiences of older people differ, their situations are variable and the manner in which development impacts on them and they impact on development will vary. The ability to respond meaningfully to these different experiences requires a knowledge base to inform programming and action. The international Younglives project on the impact of poverty on children identifies several

parallel types of knowledge gap (Boyden, 2006). These include an appreciation of wellbeing, of the different familial and environmental circumstances among the group, the impact of external factors and how the constituent group is situated within broad national and international policies. This study has also indicated that process gaps in the acquisition of knowledge by policymakers impede engagement with older people issues (see Section 11.1 in relation to the logframe and monitoring systems prepared by DFID; and Section 5.1 on accountability tools which do not seek information about older people).

(iv) Research methodologies

This study has illustrated that both qualitative and quantitative methodological weaknesses in development research methodologies are contributing to and maintaining the invisibility of older people. Information on older people's wellbeing is rarely gathered as part of general population, household and health data, and even more rarely disaggregated to identify differences within the older population. As shown in Chapter 5 older people are absent in most of the standard evaluation tools used in development and accountability measures. Had there been a requirement in global accountability tools on aid, it is highly likely that the logframe designed by DFID as WBCSSP's primary means for reporting back to DFID (as described in Section 11.1) would have included a breakdown for age. Differences between the experiences of older women and older men, the young-old, old-old, rural-urban, and able-bodied and disabled older people may be hidden in a range of data. Definitional complexities and the inaccuracies of terms used, noted in Sections 2.3 and 6.1, compound the problem of limited data. The confusion in the application of the terms 'ageing', 'older' and 'elder' serves to obfuscate the reality and make it possible for agencies to miss opportunities: for instance, the use of 'older' by the ILO relates to an ageing workforce that is within the norms of a retirement age. Their interest, while in keeping with the lifecourse approach to ageing, is thus with those who are perceived to be of economic value and not with older persons defined by the UN as those over the age of 60years. One of the IGO respondents in the case study (see Section 10.2) noted that the misunderstanding between 'elder' who can be a respected family member and 'older people' means that older people may be forgotten by programme-

makers. While the term 'elder' is suggestive of old people, it is more commonly referring to community leaders who may or may not be old, and who may or may not have an interest in issues relating to older people. Further, the term 'elder' in many cultures often refers to men, reflecting the traditional patriarchal society, thus ignoring a possible role for women 'elders' or older women as community leaders.

Studies of how people view their quality of life are a relatively new undertaking in LDCs (Bullinger and Schmidt, 2007). Particular difficulties arise for older people in measuring quality of life when such measures in international development are frequently dependent on economic value. The expressed concern for the individual and the group is often cast in the context of productivity, the ability to find work or maintain and succeed in the work place (Arber and Ginn, 1991, Clair et al., 2003, Burch and Sutherland, 2006). There is very little scope for recording similar information for older people, whose lives are no longer formalised by the work environment or education (Tajfel, 1978). The progress in gender and development brings this into relief – women and gender are now integrated into quantitative and qualitative studies. The HDI has a separate equality indicator, all data is broken down into male/female, gender analysis frameworks exist, and the take-up of specific services, such as education, demand that attendance by gender is monitored (Unterhalter et al., 2008). The recently developed multidimensional poverty index (Alkire, 2007) has the capacity to gather more data on the living conditions of older people.

It could be argued there is value in increasing the number of categories of social groupings in research design and programme assessment studies. However, the limited resources available to respond to the needs and interests of different groups might be seen to place additional pressure on already limited resources. A cross-cutting approach in programming in which all population groups, promote and record take-up by older people, would be an alternative approach to promoting and recording the issues of concern to older people. The cross-cutting approach used by the WBCSSP was reductive for the long-term interests of older people. First, older men were excluded, unless they were part of one of the other named categories; and second, the incidental nature of the

findings did not allow for further investigation of the circumstances and possible needs of older people (See Section 11.5). The constrained view of the IGOs and INGOs can be seen to result in their developing programmes, targets and accountability frameworks that may meet their interests, rather than the realities of local circumstances.

(v) A voiceless constituency

A reason for the absence of older people in the discourse was claimed by some of the informants to be the responsibility of older people themselves. This was evident in discussions with the INGOs involved in the case study, as noted in Sections 10.3-10.5. While there were indicators of local activity there was little sign of this being organised into local groups, as with the women's movement. Evidence from the women's movement has shown how grassroots movements managed to create national policy through the development of a national social movement, which in turn was able to inform global actors at international events. One of the prime reasons for the success of the women's movement was the mobilisation and voice of women themselves (Molyneux, 1998). Aside from the work of HAI, the review of the literature and the findings from the case study showed little investment in supporting older people's forums and self-advocacy programmes. The pressure to create a Convention for older people is by contrast very much a result of organisations working with or on behalf of older people, with older people's organisations contributing.

The literature on gender has shown that a substantial part of the success in moving towards a development discourse in which gender is now an integral part of development is attributable to a strong constituency of women. Their ability to caucus at the local, national and international levels has been essential to influencing development discourse and practice:

Solidarity has proven to be an extremely effective way to mobilise, gain legitimacy in the political realm and to achieve meaningful policy and socio-cultural transformations (Garcia and Parker, 2006:15).

Molyneux's (1998) categorisation of the different reasons for, and types, of women's groups and collective activity could be helpful for consolidating existing activity by older

women and for providing direction. The categories fall into a three-stage spectrum of autonomy. The first is self-help in which groups have developed their own structures, organisation, and goals. The second is associational, as part of another political or interest movement, such as the World Social Forum or environmental lobby, where they can establish their own goals and which recognises their interests within larger policy/political issues. And the third is directed collective action in which groups are established by a greater power that determines their goals and work. Although there is little autonomy in the last of these, there could be benefits in seeking to achieve a broader goal, which may not be about older people's interests directly, such as fighting for better education for all, but could have secondary benefits in learning about the corridors of power, organizing and, caucusing which have proven to be instrumental in progressing the interests of women (Harcourt, 2006).

(vi) Theoretical base

This research has indicated some contestable issues in establishing a theoretical base for integrating older people into the development discourse. These relate to the value placed on the lives of different categories of people in society; power relations between groups, as represented in the debates on the intergenerational relationships; whether 'inclusion' as social policy is about inclusion in the state or in society; and the balance between recognition and redistribution in responding to the inequitable position of marginalised groups

The review of development and gerontology in Chapter 1 highlighted some contradictions and paradoxes in the representation of older people in society (Megret, in press 2011). Holzmann and Hinz (2005) have suggested that in the short term the needs of current older people may be competing unfavourably with other 'vulnerabilities' faced by LDCs, as young people are seen as the future, and hence the recipients of national and global investment (Jenson, 2008). Development issues, such as agriculture, security, governance, education, sanitation, health are deemed to have greater immediacy and have detracted from placing a focus on older people (Pool, 2006). Anxieties are expressed about the financial costs of supporting an ageing population (Blackburn, 2007). At the

same time it has been suggested that denying consideration of older people as worthy recipients of resources is a violation of their rights (Brock, 2002, Engelman and Johnson, 2007).

Similarities are identifiable in the women/gender discourse and the older people/intergenerational discourse, in which progress in development for the 'group' in question moves from looking at its own interests to those interests from a relational perspective. 'Power' is a key element of this similarity – the power of others to determine the worth of a group in order to achieve change (Engelman and Johnson, 2007). Just as the direct focus was removed from women when the debate about the role of women in development moved from feminism to gender, so a similar pattern is emerging through discussion of life-course and intergenerational relations: both 'disguise' older people, thereby removing the focus from them. As Andrews (1999) and King and Calasanti (2006), have noted, seeking to make old people acceptable by removing their status as a 'stand-alone' group contributes to their invisibility. The paradigm of distributive justice has sought primarily to address economic equalities through applying universalist norms. However, without 'recognition' of difference this approach is unable to assess the scale of redistribution: whether it should create an equality between groups, and when would recognition be sufficient (Taylor, 2003). This has been evident in the ways in which older people have been regarded as potentially costly and of secondary importance in the mainstream of socio-economic policy and practice (Bytheway and Johnson, 1990, Estes, 1999a, Powell and Wahidin, 2006), despite the fact that the HDI assumes that a longer life is better, regardless of circumstances (Skinner and McSharry, 2005). The reality is that the opportunity costs of not affording recognition to older people could be viewed as being very low. As Unterhalter et al (2008) note, conditions with the potential to disturb the social and economic norms and relationships will be the ones that gain leverage for change.

The parallel examination of the changing discourse on women in development highlighted the contribution a theoretical base has made to increasing women's visibility in the development discourse. Feminist critical discourse has assisted in analysing the

status and position of women and gender in society seeking to transform the status of women and responded to their interests rather than needs (McIlwaine and Datta, 2003, Lazar, 2005, Harcourt, 2006). The critical feminist literature provided a basis for examining women's status and role, and by deconstructing and analysing where women have fitted into what was seen as a male dominated discourse has enabled some to adopt a different perspective on women. This is evident in the evolving analytical tools which continue to reflect on and seek an understanding of women's position in society (Lazar, 2005, Cornwall et al., 2007). It has provided an organic process of change and one in which each new theory has built on the previous, indicating also that change does not have to be an 'either-or' approach. There is scope for adapting some of these applications to address both older women in the gender and development discourse and older people in the wider development discourse. Moser's three-part model, for example, which addresses reproduction and child-care could have usefully introduced a fourth dimension that would take account of the long-term physical consequences for women as they age and for their position in the family as they become dependents (see Chapter 4.2). Similarly, it may be timely to develop an 'eldist' critical discourse that could challenge the ageist and hegemonic power relations that sustain the position of invisibility of older people in the development discourse.

RQ5 What factors would influence a positive change in policy and practice?

Several factors have emerged from the analysis above of Research Questions 3 and 4 that would contribute to a positive change in international development policy and practice relating to older people. They include taking individual and collective responsibility, creating dynamic knowledge gathering systems, and generating simple new accountability tools. The key features have been drawn out and are summarised in this section.

The normative position on older people as persons in need of care militates further against their potential inclusion in development programmes (Chakraborti, 2004). Traditional 'care' responses that focus on potentially expensive solutions such as residential homes are unaffordable to the majority of the population. In an arena of

competing priorities in LDCs this does not make the older population an appealing constituency for public policy. However there is evidence that programmes which seek to understand local conditions and traditions, and the needs of individuals within communities are able to integrate the needs of a wider range of people within a community (Pereira, 2002, Garcia and Parker, 2006). Distinguishing between an individual's needs and interests in the discourse is essential for ensuring that policy responses reach beyond straightforward policy and practice applicability to food, shelter and care, to meeting more fluid requirements of agency and aspiration (Molyneux, 1998). Thus when global policies are translated into national and local programmes and practice they need to take the widest meanings, not the most restrictive, and build on the learning of other democratic and capacity building programmes, and not be confined to welfare objectives (Unterhalter et al., 2008).

Seshia's (2003) study of agricultural change in India over a 25 year period shows that India was open to change from external agencies – both IGO and INGO. Thus, identifying how the discourse is affecting policy and practice would benefit from examining the actions of officials from local civil servants to senior policymakers. Section 8.3 noted that a public discourse is maintained at all different levels, with responsibility for its impact sustained by decision-makers throughout a process: from senior policy makers in the UN to administrative staff in a local CBO. Decision-makers usually have a range of options before them in the management of public problems and opinion, including the option of ignoring them or not addressing them (Grindle and Thomas, 1991). Though the IGOs also acknowledge that their priorities are influenced by those of the countries in which they work, they are not without influence and are able to identify unmet needs, as they do in many other areas, or to select partners and programmes which meet their own organisational priorities. IGOs and bi-laterals have the ability to influence local development through funding and their increasing engagement with civil society (Giffen and Judge, 2010). The senior UNDP official in Delhi, for example, noted that despite the lack of guidance from above on older people, she would now request that her colleagues addressed the interests of older people in their pro-poverty programme. An examination that isolated the cost-benefit for different tiers

of agency of making change happen for old people could contribute to effecting change. Taking account of who might gain or lose if policy changes were put in place for older people or what the potential costs of making change happen could help in devising and promoting achievable programmes.

Several of the informants in the case study expressed interest in the issues raised by the researcher and proffered some thoughts on possible future actions that they might take. Uncertain about whether infrastructural developments, such as old age care homes and day centres would be appropriate responses, or what kind of policies needed to be in place to improve living conditions for older people, DFID-I expressed interest in receiving information that would influence their approach to addressing the interests of older people (see Section 10.3). Providing guidance that explained the significant requirements of older people and helped them as an agency identify the most appropriate responses to these would be particularly useful. PRIA in Kolkata said they were willing to take the opportunity presented to them of becoming more informed about older people's issues and reflect on how they could use the report from the workshop in their discussions with local policy makers (see Section 11.4.). They acknowledged that an attitude shift was required in respect of older people and suggested a series of practical measures to help affect this, covering organisational and developmental issues, including increased campaigning by older people's groups, developing the skills of old people, allocating resources to dedicated personnel and making conscious efforts to seek out needs of older people. Western responses to dealing with older people were not regarded as being the answer: not just for financial reasons, but because the cultural expectations of the family support system remained strong as discussed in Chapter 1 (see Eyesemitan, 2002, Distaso, 2005).

The UN agencies and bi-lateral donors hold some authority over programmes for social development in LDCs, most overtly enacted by awarding grants and loans. This could be built on to create global-national and global-local discourses able to attend to the changing reality of the lives of older people, simultaneously contributing to macro-policy responses. The strategy of the SHG in West Bengal (see Section 11.4) to disseminate

information about older people to its local and State government, presents a small example of this type of activity. If the IGOs and INGOs are willing to represent the interests of older people to national government, organisations working at the grassroots may find it easier to take action. Increased pressure may also release resources and funding. Providing an evidence-base of ‘incidental’ take up by older people from IGO and IGO ‘non-age’ specific development projects would also assist local organisations make a case for support with national and state governments.

At the global level international levers able to influence or compel changes in behaviour could contribute to changing policy and practice for older people, as the progress of women’s inclusion in development illustrated in Chapter 4.2. In the light of the findings from the IGOs and INGOs who apply human rights and rights-based approaches in their work programmes but who have yet to include older people, a UN Convention and rapporteur dedicated to ageing and older people could provide leverage for including older people into their work. Evidence of the success of such bodies is well documented in the women and development literature and although it is not an answer it nevertheless provides an invaluable base for recognising older people as citizens (Megret, in press 2011).

The 2002 Plan on Ageing is seen as substantial in offering guidance for international bodies as well as nation states. But this requires leadership and resources, neither of which have been made available for ageing (Sidorenko, 2008). The lack of political momentum following the 2nd World Assembly on Ageing, coupled with older people not being viewed as a political threat, are acting as major inhibitors to progress on the ground (Sidorenko, 2008). In the absence of resources and leadership the status and position of older people in international development needs to be subject to and integrated into the changing priorities in development, in ways that manage the perceived threat of ageing populations positively and offer opportunities to older people to contribute to changing circumstances. Progress needs to be both strategic and practical (Molyneux, 1998, Fraser, 2000). UN-DESA suggested in a follow up guide to MIPAA that a means of reducing the outcomes of the ‘threats’ would depend on the speed with which ageing

populations are integrated into development agendas and related policies (UN-DESA, 2008). The evidence suggests that change will arise from a combination of top down and bottom up activity. As Foley (1996) noted in a study on the power of civil society the paradox of changing public policy rests on it being in an area in which there is already global interest and global accountability (Foley and Edwards, 1996).

Finally the case study approach used in this research raised awareness among the stakeholders in India and acted as a developmental tool in itself, as I indicated in my discussions with DFID, UNDP and PRIA (see Chapter 10), and was reflected in the responses from the CSOs (see Section 11.3). The face to face interviews with the INGO and IGO stakeholders provided an opportunity for informing them that there was an issue to be addressed, which none of the stakeholders denied. It exposed them to ways of thinking about how they might address or integrate the interests of older people into aspects of their work, as the UNDP respondent, for example, demonstrated when talking of how they could indeed include older people in UNDP's India strategy for raising household income (see Section 10.1.1). Others made practical suggestions that had direct applicability to the Indian context, such as creating alternative families or communities to provide housing for orphans and older people. Likewise the workshop and the surveys stimulated ideas for further action by the CBOs, including organisational planning to encourage and support older people's forums and pressure groups, identifying simple ways of keeping organisations informed of data about the lives of older people as opposed to assuming what they all need and/or want (see Sections 11.2 and 11.3).

RQ6 To what extent is it possible to establish a connection between global discourse about older people and local development practice?

The research has demonstrated direct links between the global development discourse and local practice through both the discourse analysis and the case study. For example, the search for references about older people in UN and other guidance on international development accountability and evaluation criteria (see Chapter 5), showed a constant absence of reference. A corollary absence of such criteria was apparent in DFID's reporting mechanisms for the WBCSSP grantees (see Section 11.1). The absence of

DFID funding to support the participation of older people in the WBCSSP, in contrast to other marginalised groups whose interests were incorporated, further reflected the exclusion of older people from the wider discourse (see Chapter 7). Those who had designed the WBCSSP (Section 10.3) noted that older people may have been omitted on the grounds that the Programme was about empowerment and democratisation and not about the provision of direct services to vulnerable groups. The inference was that older people were only passive recipients of care, and not contributors to development. This directly reflects the dominant attitudes held about older people that were identified in the WDRs and HDRs (see Section 7.4).

These results need to be seen, however, within the context of a complicated set of relationships (see Section 8.2), that include intermediary bodies and their impacts on local perceptions. This study represents two ends of a spectrum, from the grassroots to the global and international, and thus may need to be considered with caution. Taking a lengthy period of review and a mixed methodologies approach that combined literature review, CDA and field study, as this study did, made it possible to reveal continuities and changes in the ways in which older people were represented against a changing socio-historical background, and the impact of this on public policy (Seshia and Scoones, 2003). The application of a CDA to an extensive body of documents helped substantially in identifying the silence and low visibility of older people in the discourse. Of most significance to this thesis are the ‘manipulative silences’, described by Huckin (2002:347). Screening or hiding relevant information from policymakers and practitioners about older people has contributed to an environment in which the interests of older people go unnoticed, unquestioned, and without repercussion for the individual official (Hall, 2001). The case study provided a real life illustration of this silence and how a global development discourse is converted to policy and thence to practice (van Leeuwen, 1993).

A challenge for this study is being able to demonstrate the extent of the links between implementation processes and procedures and grassroots activity, and the intentions behind the silence: how much is causality, how much chance, where responsibility

resides or is taken for maintaining a status quo or for seeking change (Seshia and Scoones, 2003) As the Unterhalter et al (2008) study illustrated, the presence of a substantial discourse on a particular issue does not necessarily result in positive grassroots change. On the other hand neither does the absence of a global discourse mean there is an equivalent absence of local practice in that area (Pereira, 2002). The case study in this thesis clearly demonstrated that there was pre-existing activity taking place with older people at the local level, albeit at a much lower level of engagement than that with other marginalised groups in the area. As noted in Section 11.2, eleven of the 14 questionnaire respondents stated that they were either directly (four respondents) or indirectly (seven respondents) engaged with older people in their work. Communities are not simply waiting for an invitation from outside agencies to develop responses to needs, but external support and resources (or their lack) send messages about the differential value of certain spheres of activity, and can encourage or discourage action.

However this is only one study, and interviews with more CBOs involved in the CSSP to learn more about their relationships, aspirations and experiences of seeking funding from NGOs and INGOs would have revealed a more nuanced understanding of the links between the global and local. It would therefore be useful to allocate additional time for this in any future similar study. This may also require the assistance of an interpreter to build confidence with the interviewee and to gain a greater understanding of local circumstances and politics.

This study benefited from including the perspectives of a range of different bodies, although there was some prevarication by the international NGOs in arranging meetings which could be interpreted as their being reluctant to engage with the issues. Sensitivity is needed in requesting smaller organisations to give up their time to research, especially if there does not appear to be an immediate return for that organisation. DFID-I and UNDP were more forthcoming in responding to and arranging meetings with the researcher than the national and international NGOs, (other than HAI). Their responses also reflected a greater interest in the issues concerning older people and development. Although more evidence would be required to examine whether the government bodies

are more interested in the issues than non-State actors it is worth noting that a future similar study which engages with a plurality of actors (Seshia and Scoones (2003) may benefit from different approaches in the ways in which they are contacted and involved as research participants.

This research has contributed to the knowledge-base of how discourse links to practice. As noted in Section 1.3 of this thesis, other studies have been in relation to already acknowledged areas of activity, rather than, as in the case of this thesis, in relation to areas that are being neglected or silent. Engagement with CBOs in the case study identified a process gap in their being able to transfer their knowledge and experience to global and national organisations in meaningful ways. As Periera (2002) comments, the aim is not to privilege the local over the global (or national), but to inform it, so that the global understands changing histories, economies and cultures.

Further research using the framework developed for this thesis could be undertaken to gather converging evidence of the extent of a causal link between a global discourse and local practice. Acknowledging that the situations are context specific would however require additional criteria for the selection of projects, including geographical location and identification of IGOs for examination, to ensure a basis for common learning.

12.3 Building a conceptual framework

It is helpful to remind ourselves of the core issue that is being addressed by this research: the numbers of older people are growing and traditional support is breaking down in an environment of difficult choices concerned with prioritising resources (Harper, 2004, Vera-Sanso, 2004b, Alam, 2007, Lloyd-Sherlock, 2010). Given this, is there an overall 'right' response for old people? The significant global agreements on ageing, such as the International Plans of Action and the General Assembly Resolutions on ageing have been concerned with welfare and social protection, and active ageing and wellbeing (Coast et al., 2008). The MIPAA (2002) develops an approach that combines local flexibility in developing programmes that meet local circumstances with fewer explicit demands on

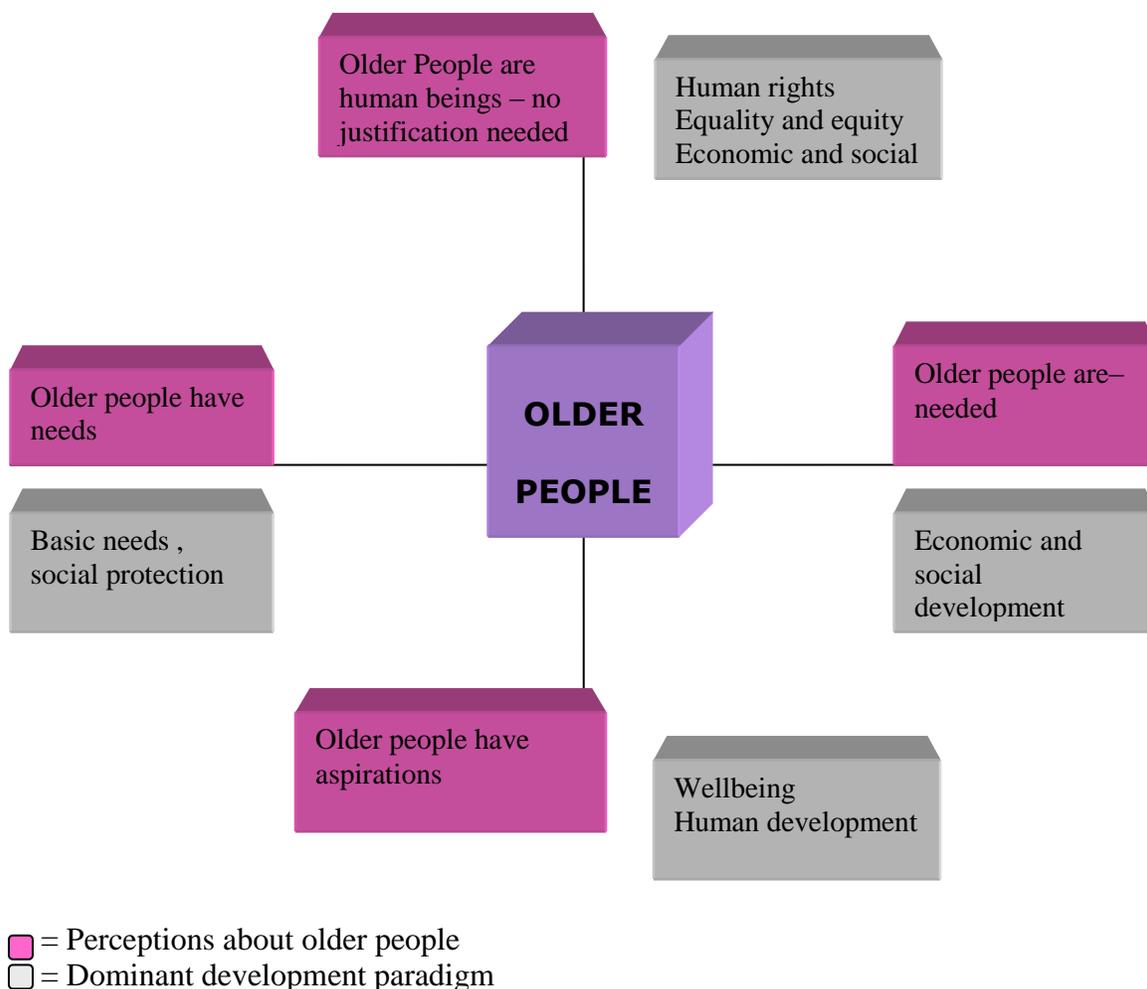
governments with indicates a pragmatic approach to change. A common response to improving the position of particular groups in society is to encourage organisations to adopt a ‘mainstreaming’ approach. UNECE, for example, has been advocating this approach towards ageing for European governments. Mainstreaming however requires an awareness that there is an issue to be addressed in the first place – how to reach and maintain an awareness is the critical first step, and a willingness to re-allocate resources (Foley and Edwards, 1996, Thomson and Goldsmith, 2004). Learning from the gender and development experience has shown that success in raising the visibility of women has been the result of a range of approaches: from the strategic to the practical, from the managerial to the reflective, as noted in Section 4.2 (Kabeer, 1994, Fraser, 2000, Mukhopadhyay and Meer, 2004). The transformative role of feminism whereby women were to use their power in society (Reid, 2005) presents possibilities and difficulties as the basis for achieving change for older people. The older people’s movement is still weak, but could be built upon and strengthened. DFID’s PACS programme, (discussed in Chapter 9) which sought to enable socially excluded people (but not older people) to increase their access to benefits and entitlements, is an example of where older people could have been integrated into a broader programme. Criticisms applied in feminist discourse also suggested that interventionist or instrumentalist responses were reductionist and continued to subordinate women (Reid, 2004/5). There is a need to understand the specificities of people’s position in order to develop effective policies (Vera-Sanso et al., 2010).

The research has indicated that western approaches to meeting the interests of growing older population in the LDCs are unlikely to work because they are unaffordable (Das et al., 2008b, Chakravarty, 2009). Transformational change, defined here as ‘signifying changes in relations of power and authority and growing equality between social groups’ has yet to be considered as a goal that could alter and strengthen the position of older people in society, particularly given the imperatives of poverty eradication and intra-family support (Mukhopadhyay, 2007 :137). There is a need to build the interests of older people into current development paradigms, most particularly into theories of marginalisation, human rights, wellbeing and human development where there is a focus

on the human condition beyond its economic function (Fraser, 2000, Dean, 2007, Fenech, 2007).

A number of factors have emerged that suggest a new conceptual model for bringing together ageing and development that could afford a greater recognition of older people in society. The model is in two parts: Part 1 is the theoretical framework and Part 2 the operational framework. Part 1 draws on the four subject categories identified in Chapter 6. These are that older people have needs (security, social protection); older people are needed (providing family and domestic support); older people have aspirations (continued learning, new skills); and older people have the right of 'being there' (they have an entitlement to live with no labelling necessary to 'justify' their existence). Each of these can be allied to one of today's dominant paradigms of development. Figure 6 below offers a visual representation of such relationships. Older people are presented as the central focus and the four axes show how the different perspectives of older people, as expressed by those working in development, can be situated within each of the development paradigms. There is no order of priority among the four categories, nor are they mutually exclusive. Different points will dominate, depending on the point in the life-course of the older person. For example, increasing frailty may inhibit an individual's ability to participate though not necessarily take away their desire to contribute. The essence of the framework is to recognise that whichever development paradigm is underpinning the work of a particular agency or global development event, there is scope within it for addressing the interests of older people. This conceptual approach seeks to offer ways of viewing older people in new ways, rather than viewing them as different from the rest of society. Institutions view older people and to look at context specific locations of inequality that have the power to exclude or marginalise older people.

**Figure 6 Conceptual framework for addressing ageing and development
Part 1: aligning the development and older people paradigms**



The research revealed areas for change that could address the knowledge and awareness gaps that keep older people invisible and excluded from international development. The key features which have become evident to the researcher are represented by the four pillars in Figure 7 below. These are (i) a need for a cultural change to recognise that attitudes towards, and the circumstances of, older people are changing and that new responses are required; (ii) a societal change to actively include older people in democratic and participative processes that influence their daily lives; (iii) new legislative frameworks to provide leverage and formal accountability for ensuring that changes take place; and (iv) institutional frameworks that affect policy making, programming and

implementation of development in practice. Taking this as a starting point the discourse for each paradigm could be modified accordingly.

**Figure 7 Conceptual framework for addressing ageing and development
Part 2: theory into practice**

Ageing on the Agenda – A Conceptual Model			
Cultural change ... perceptions of older people	Social change ... participation and inclusion	Structural change ... levers and accountability	Institutional change ... mainstreaming
<p>An on-going process</p> <p>LDC centred-gerontology</p> <p>Independence v interdependence</p> <p>Dialogue with local communities</p> <p>Changing visual images</p>	<p>Engaging with older people</p> <p>Create a discourse among older people</p> <p>Involve and empower older people</p> <p>Integrated v segregated activities and support</p> <p>Maintaining a focus on older people</p>	<p>Legislation and policy framework</p> <p>Convention on older persons + rapporteur</p> <p>General assembly resolutions</p> <p>Framework for social protection</p> <p>MDGs</p>	<p>Tools and methods</p> <p>Organisational learning for UN agencies and INGOs</p> <p>Mainstreaming in to work of agencies</p> <p>Learning & training</p> <p>Equality of outcomes</p>
Examples of practical action*			
<p>(i) Village social surveys to increase visibility of older people (ii) Adapt QoL indicators for developed and developing countries (Molzahn, 2010)</p>	<p>(i) Develop and support forums of older people (ii) Include older people as Committee members (iii) Provide income earning schemes</p>	<p>(i) Include targets for older people in MDGs; create separate MDG (ii) Adapt features of HDIs and HPIs</p>	<p>(i) Include age as a category in grant application and implementation criteria (ii) Include age in evaluation criteria (iii) Disaggregate data over 60 + years</p>

(Adapted from: Thomson and Goldsmith, 2004:39).

The examples in the table relate to research and evidence that has emerged through this thesis

Conversion of the theoretical model into an operational framework would require a baseline of fundamental principles and practical measures to inform policy and practice. For example, where data is available for older people it would need to be disaggregated beyond the age of 60; data on the circumstances of older people would need to be collected, such as identifying those who are entitled to and who are claiming benefits. HDIs could include measures of life expectancy at different ages, not just from birth. The UNDP's new multidimensional poverty indicator (MPI) which refines the HDI to capture deprivations directly demonstrates a more nuanced approach to assessing the lives of households. It includes access to key services such as water, sanitation and electricity, and has the capacity to be 'deconstructed by region, ethnicity and other groupings as well as by dimension, making it an apt tool for policymakers' (UNDP, 2010:7). Its reference to 'other groupings' holds the possibility for assessing the quality of life of older people in relation to these practical measures of wellbeing. The indicators for education and literacy could be applied at these later years and become meaningful in advocating for personal development opportunities for older people. Definitions of a household and who an 'older person' is would need to be clear and used consistently across an organisation. A heightened awareness of the issues would increase the possibilities for agencies at all levels to convert unintended consequences to intended actions. An awareness of the interests of older people at the outset of the programme could have stimulated further investigation of the circumstances of older people in those communities.

The development of a strong constituency of women has been shown to be pivotal to the progress on women in development (Kabeer, 1994). The pillar on social change in Figure 7 presents some examples for effecting such change for older people. Some are already beginning to voice the need to create an 'international grassroots forum of the politics of old age' (Walker, 2005:832) and to look at common cause as the means for change. At a meeting of the Committee for Social Development in 2007, for example, Cameroon called for more international solidarity on behalf of older persons and for the establishment of a world fund to finance programmes on ageing (Department of Information UN, 2007). In 2004 the UNHCR instigated a research programme in eight

countries to pilot mechanisms for mainstreaming gender and ageing in to development.¹³⁴ In the area of research on older people, quality-of-life measures that have been put to wide scale use in the UK are being tested in some LDCs (Bullinger and Schmidt, 2007); and following much campaigning from the global bodies with a specific interest in ageing, the UN is looking to disaggregate the statistical data which it gathers on the over 60s (UN-DESA, 2007).

There will be different examples depending on which of the paradigms is the starting point for analysis, but it is likely that in all situations certain baseline data and principles, such as clear definitions and disaggregated data, will need to be put in place.

Development is more than the available limited indicators used to measure it hence the need for an approach which looks beyond mainstreaming and target setting to examining processes of influence and power. In summary the proposed model suggests a new perspective for identifying how the interests of older people could be brought to the fore in development, by taking an approach that builds on theory, policy and practice of development and gerontology.

¹³⁴ <http://www.globalaging.org/armedconflict/countryreports/africa/ageandgender.pdf>

Conclusion to the thesis: improving visibility

*'Aging is not a stop sign for growth'*¹³⁵

My research shows that older people are under-represented in development in contrast to other groups. The content analysis and case study showed that older people have been overlooked in development theory, policy and practice, and that references to older people tend towards a charitable view of them rather than to one based on equality and rights. The research also shows that the IGOs, which bear much of the responsibility for the discourse on development, do not appear to have followed the example from the global agenda setting events on ageing, such as the World Summits, the Principles on Ageing or the GA Resolutions.

A strength of the approach taken was that it raised awareness among the stakeholders in India and acted as a developmental tool in itself, as I indicated in my discussions with DFID, UNDP and PRIA (see Chapter 10). The face-to-face interviews with the INGO and IGO stakeholders provided an opportunity for informing them that there was an issue to be addressed, which none of the stakeholders denied. It exposed them to ways of thinking about how they might address or integrate the interests of older people into aspects of their work. Some made practical suggestions that had direct applicability to the Indian context, such as creating alternative families or communities to provide housing for orphans and older people. Likewise the workshop and the surveys stimulated ideas for further action by the CBOs, including organisational planning to encourage and support older people's forums and pressure groups, identifying simple ways of keeping organisations informed of data about the lives of older people as opposed to assuming what they all need and/or want (see Sections 11.2 and 11.3).

¹³⁵ From Chawla M., Betcherman G. and Banerji A. (2007), *From Red to Gray: The "Third Transition" of Aging Populations in Eastern Europe and the Former Soviet Union*, (World Bank, Washington D.C.).

The growing numbers of older people in LDCs matter in the context and meaning of international development. In an environment of declining family support and increasing poverty, many older people are facing the heightened risks familiar to other socially excluded groups. Not all old people are poor, deprived or in need of social, economic and physical support. But whether they are in need or not, the research shows that their interests as citizens in modern society are not being attended to. Investment is being made in human capital at the start of life, with increasing provision in education and training. If we direct attention to decreasing poverty and child mortality we have to plan for a future in which there will be increasing numbers of older people. The consequences of investing in mother and child programmes to increase life expectancy are not sustainable without also having consideration to policies that support people at later ages. There is no corollary investment to meet the increase in life expectancy, which is one of the key outcomes of that early investment. Preparations are not in place for the current population of older people and neither are they being made by the international agencies for the rapidly growing future older population.

There have been a few positive relevant developments since starting this thesis. In 2008, the World Economic Forum (WEF) created a Global Agenda Council on ageing (one of a number of Councils that is an amalgamation of scientists, public policy makers, academics, physicians and business) to address global issues associated with an ageing society (Olshansky et al., 2011). In November 2010 the General Assembly adopted a landmark resolution to set up a working group to consider how to strengthen the protection of older people's rights (HelpAge International, 2010). A month earlier, CEDAW took a major step forward in the protection of older women by adopting a new general recommendation on the rights of older women (Begum, 2011).

To my knowledge, this has been the first work to consider the visibility of older people in development discourse and to explore a relationship between global discourse and local practice in respect of older people. There have been limitations to my study. The wealth of documents available for review is vast and sources may have been missed or there may be relevant activities by the UN bodies and other organisations that were not evident.

Consideration of one case study in a particular place at a particular time and in particular circumstances, also limits how many lessons can be learned from a single situation and how much it is possible to generalise from one study. A further study could explore in more depth how CBOs decide on their priorities, and identify in greater detail their actual and potential work with and for older people. However, the findings in this research are strong and have been supported through the use of mixed research methods. The study has provided an illustration of how the development discourse has affected local practice by, *inter alia*, a lack of knowledge and understanding of the requirements of older people. In the absence of much activity by the international agencies this study suggests a new approach for engaging IGOs in an ageing and development discourse.

Conceptually the study has shown that there are links to be made between gerontology and development, as I have shown in Chapter 2.3. At the outset the research on ageing and development disciplines revealed commonalities in the two areas. In both disciplines there is co-occurrence in policy and practice in the areas of human rights, equality, marginalisation and social exclusion. At the practice level both disciplines have been concerned that those whose lives will be affected are given the opportunity to influence and play an active part in creating their socio-economic environments. Gerontological studies have yet to explore in more depth the impact of development on older people or solutions that are pertinent to the circumstances of LDCs (Walker, 2005, Lloyd-Sherlock, 2010). An understanding of how language is used and influences people and their positions in society is required.

Never has the maintenance and protection of marginalised communities been more relevant. As populations age in poor countries where there is little or no provision older members may need to rely much more on each other (Das, 2008). The thesis notes the scope for further research to gain greater understanding of the factors that would encourage or enable society to include the interests of older people in international development.

History has demonstrated that the achievement of change from the margins to the mainstream usually involves strong and visible representation by the group that is marginalised (Kabeer, 1994, McIlwaine and Datta, 2003). The situation is different for older people. In older age it becomes harder to take on and sustain the intensity of activity necessary to effect change. This situation is one that should qualify for more resources, not fewer.

Bibliography

- Aboderin I. (2004), 'Modernisation and ageing theory revisited: current explanations of recent developing world and historical Western shifts in material family support for older people', *Ageing & Society*, **24**, **01**, 29-50.
- Aboderin I. (2005), '"Conditionality" and "Limits of Filial obligation: Conceptual levers for developing a better understanding of the motivational basis and societal shifts of patterns in old age family support"', *Working Paper Series*, **205**.
- Actionaid India (2008a), 'Actionaid India Annual Report 2008: Voicing the Marginalised', (Bangalore: Action Aid), 66.
- ActionAid India (2008b), 'Shadow Report on Government of India/s II, III, IV & V Combined Report on ICESCR', (Bangalore: ActionAid), 52.
- Ainsworth S. (2001), 'Discourse Analysis as Social Construction: Towards Greater Integration of Approaches and Methods', *The Second International Conference on Critical Management Studies*, (Manchester, 27).
- Akerkar S. (2005), 'Rights, development and democracy: a perspective from India', in P. Gready and J. Ensor (eds.), *Reinventing Development? Translating Rights-Based Approaches: from theory to practice*, (London: Zed), 144-55.
- Alam M. (2007), 'Is Caring for Elders an Act of Altruism? Some Evidence from a Household Survey in Delhi', *UN Social Policy Division (DESA) Expert Group Meeting: Intergenerational Solidarity - Strengthening Economic and Social Ties*, (New York, 26).
- Alam M. (2009), 'Ageing, Socio-economic Disparities and Health Outcomes: Some Evidence from Rural India', *Indian Journal of Human Development*, **3**, **1**, 32.
- Alkire S. (2007), 'The Missing Dimensions of Poverty Data: Introduction to Symposium', *The Missing Dimensions of Poverty Data*, (Oxford).
- Andrews M. (1999), 'The seductiveness of agelessness', *Ageing & Society*, **19**, 19.
- Andrews M. (2009), 'The narrative complexity of successful aging', *International Journal of Sociology and Social Policy*, **29**, **1/2 Special issue on "Theorising Ageing Studies"**, 11.
- Antaki C., Billig M., Edwards E. and Potter J. (2003), 'Discourse Analysis Means Doing Analysis: A Critique Of Six Analytic Shortcomings', *Discourse Analysis Online*, 38.
- Arber S. and Evandrou M. (1993), 'Mapping the Territory: Ageing, Independence and the Life Course', in S. Arber and M. Evandrou (eds.), *Mapping the Territory: Ageing, Independence and the Life Course*, (Gateshead: Athenaem Press), 9-26.
- Arber S. and Ginn J. (1991), 'The invisibility of age: gender and class in later life', *Sociological Review*, **39**, **2**, 260-91.
- Atkinson P. A. and Coffey A. (2002), 'Revisiting the Relationship between Participant Observation and Interviewing', in J. F. Gubrium and J. A. Holstein (eds.), *Handbook of Interview Research*, (London: Sage), 13.
- Baars J. (2007), 'Chronological Time and Chronological Age: Problems of Temporal Diversity', in J. Baars and H. Visser (eds.), *Ageing and Time: Multidisciplinary Perspectives*, (Amityville: Baywood).

- Baars J., Dannefer D., Phillipson C. and Walker A. (2006), 'Aging, Globalization and Inequality: The New Critical Gerontology', in J. Hendricks (ed.), *Society and Aging*, (Amityville, New York: Baywood Publishing Company, Inc.), 300.
- Baker P., McEnery T. and Gabrielatos C. (2007), 'Using collocation analysis to reveal the construction of minority groups: The case of refugees, asylum seekers and immigrants in the UK press.'
- Baltes P., Freund A. and Li S.-C. (2005), 'The Psychological Science of Human Ageing', in M. Johnson (ed.), *The Cambridge Handbook of Age and Ageing*, (Cambridge: Cambridge University Press), 24.
- Barr J., Basavraj S., Girdwood A., Harnmeijer J. W., Mukherjee A., Prakash S. and Hilary Thornton (2007), 'Evaluation of DFID Country Programmes Country Study: West Bengal Final Report ', *CPE*, (London: Department for International Development, UK Government).
- Barrientos A. (2002), 'Old age: poverty and social investment', *Journal of International Development*, **14**, **8**, 9.
- Barrientos A. and Hulme D. (2008), 'Social Protection for the Poor and Poorest: Concepts, Policies and Politics', in A. Barrientos and D. Hulme (eds.), *Social Protection for the Poor and Poorest: Concepts, Policies and Politics*, Palgrave Studies in Development, (New York: Palgrave Macmillan).
- Begum F. A. (2011), 'Effective Protection of the Human Rights of Older Women through the CEDAW Convention and the General Recommendation Number 27', *The First Substantive Session of the Open Ended Working Group on Strengthening the Human Rights of Older People*, (UN, New York, 8.
- Bengston V., Putney N. and Johnson M. (2005), 'The Problem of Theory in Gerontology Today', in M. Johnson (ed.), *The Cambridge Handbook of Age and Ageing*, (Cambridge: Cambridge University Press), 18.
- Bennett G. and Ebrahim S. (1995), *The Essentials of Health Care in Old Age*, (Edward Arnold, London).
- Bhagat R., B. and Unisa S. (2006), 'Ageing and Dependency in India', *Asian Population Studies*, **2**, **2**, 201 - 14.
- Blackburn R. (2007), 'How to implement a global old age pension and youth grant ', *New Left Review*, **47** 71 - 93.
- Blakemore K. and Boneham M. (1994), *Age, Race and Ethnicity. A comparative approach*, (Open University Press, Buckingham).
- Boulin J., Lallement M., Messenger J. C. and Michon F. (2006), 'Decent working times: New trends, new issues', (Geneva: ILO), 465.
- Bowling A. (2005), *Ageing well: quality of life in old age*, (Open University, Maidenhead).
- Bowling A. and Dieppe P. (2005), 'What is successful ageing and who should define it?', *BMJ*, **331**, **7531**, 1548-51.
- Boyden J. (2006), 'Young Lives project: Concepts and analytical framework', 17.
- Brock D. W. (2002), 'Health Resource Allocation for Vulnerable Populations', in M. Danis, C. Clancy and L. Churchill (eds.), *Ethical Dimensions of Health Policy*, (Oxford: Oxford University Press), 283-89.
- Bryman A. (2004), *Social Research Methods*, (OUP, Oxford).

- Bullinger M. and Schmidt S. (2007), 'Cross-cultural Quality of Life assessment: approaches and experiences from the health care field', in I. Gough and J. A. McGregor (eds.), *Wellbeing in Developing Countries: From Theory to Research*, (Cambridge: Cambridge University Press).
- Burch S. and Sutherland I. (2006), 'Who's Not Yet Here? American Disability History', *Radical History Review*, **Winter 2006**, **94**, 21.
- Burman E. (1996), 'Local, Global or Globalized? Child Development and International Child Rights Legislation', *Childhood*, **3**, **1**, 22.
- Butler R. (2002), 'Declaration of the Rights of Older Persons ', *World Assembly on Ageing*, (Madrid, 3).
- Bytheway B. (1995), *Ageism*, (Open University, Buckingham).
- Bytheway B. and Johnson J. (1990), 'On defining ageism', *Critical Social Policy*, **27**.
- Carabine J. (2001a), 'Constituting sexuality through social policy: the case of lone motherhood 1834 and today', *Social and Legal Studies*, **10(3)**, **3**, 291-314.
- Carabine J. (2001b), 'Unmarried Motherhood 1830–1990: A Discursive Genealogical Analysis ', in M. Wetherell, S. Taylor and S. J. Yates (eds.), *Discourse as Data: A Guide to Analysis*, (London: Sage).
- CARE USA (2007), 'The Changing Times: a plan for change', *Annual Report*, (Atlanta: CARE USA), 44.
- Chakraborti R. and Sarkar R. (2009), 'Phenomenon of Ageing Citizens of the Globe: Challenges and Opportunities of Biotechnology for Better Health Care System', (Kolkata).
- Chakraborti R. D. (2004), *The Greying of India: Population Ageing in the context of Asia*, (SAGE, New Delhi).
- Chakraborty F. (2001), 'Contributions of the elderly in an agrarian setting in rural West Bengal: Perspectives on policy', *Livelihoods and Poverty Reduction: Lessons From Eastern India*, .
- Chakravarty I. (2009), 'Director of CMIG', (Kolkata).
- Chambers R. (1997), 'Editorial: Responsible well-being — a personal agenda for development ', *World Development*, **25**, **11**, 12
- Chambers R. (2004), 'Ideas for development: reflecting forwards', *IDS Working Paper*, **238**, 46.
- Chambers R. (2006), 'Poverty Unperceived: Traps, Biases and Agenda', *IDS Working Paper*, **July 2006**, **270** 48.
- Cheney K. (2007), 'Global Rights Discourse, National Developments and Local Childhoods: Dilemmas of Childhood and Nationhood in Uganda, East Africa', in R. Findlay and S. Salbayre (eds.), *Stories for Children: Histories of Childhood*, (Tours: Presses Universitaires Francois Rabelais), 13.
- Cheung C.-K. and Kwan A. Y.-H. (2009), 'The erosion of filial piety by modernisation in Chinese cities', *Ageing and Society*, **29**, **02**, 179-98.
- Chudacoff H. P. (1989), *How Old Are You? Age Consciousness in American Culture* (Princeton University Press, Princeton).
- CIDA (2006/07), 'Annual Report', CIDA).
- CIDT (2008), 'Provisional Age Audit of Department for International Development (DFID) Public Documents', (Wolverhampton: Centre for International Development and Training, University of Wolverhampton,), 35.

- Clair J. A., Beatty J. E. and MacLean T. (2003), 'Out of Sight but Not Out of Mind: Managing Invisible Social Identities in the Workplace', *Academy of Management Journal*, 43.
- Cleland J. (2008), 'A Job Half Done: Family Planning in the 21st Century', (London: LSHTM).
- Coast E., Randall S. and Leone T. (2008a), 'The commodity chain of the household: From survey design to policy planning', *3rd ESRC Research Methods Festival, Oxford University. Work in progress*.
- Coast J., Peters T. J., Natarajan L., Sproston K. and Flynn T. (2008), 'An assessment of the construct validity of the descriptive system for the ICECAP capability measure for older people', *Quality of Life Research*, **17, 7**, 967-76.
- Cohen L. (1992), 'No aging in India: The uses of gerontology', *Culture, Medicine and Psychiatry*, **16, 2**, 38.
- Commission on Human Rights (2007), 'The Right to Development: Report of the Open-Ended Working Group on the Right to Development', (Geneva: United Nations).
- Cooke B. and Kothari U. (2001), 'The Case for Participation as Tyranny', in B. Cooke and U. Kothari (eds.), *Participation: The New Tyranny*, (London: Zed), 16.
- Corbridge S. (1995), *Development Studies: A Reader*, (Edward Arnold, London).
- Cornwall A., Harrison E. and Whitehead A. (2007), 'Introduction: Feminisms in development: contradictions, contestations & challenges', in A. Cornwall, E. Harrison and A. Whitehead (eds.), *Feminisms in development: contradictions, contestations & challenges*, (London: Zed Books Ltd), 21.
- Coupland N. and Coupland J. (1995), 'Discourse, Identity, and Aging', in J. F. Nussbaum and J. Coupland (eds.), *Handbook of Communication and Aging Research*, (Mahwah, NJ., Hove: Lawrence Erlbaum Associates), 24.
- Cowgill D. (1972), 'Ageing and modernisation: A revision of the theory.', in D. O. Cowgill and L. D. Holmes (eds.), (New York: Appleton-Century).
- Culpitt I. (2006), 'Theories of Aging: Foucault's Agonistic Challenge', in J. L. Powell and A. Wahidin (eds.), *Foucault and Aging*, (New York: Nova), 131-44.
- Cumming E. and Henry W. E. (1961), *Growing Old*, (Basic Books, New York).
- Cunningham H. (2005), *Children and Childhood in Western Society since 1500*, (Pearson, Harlow).
- DANIDA (2005), 'Annual Report', *Danish International Development Agency Annual Report*, (Copenhagen: DANIDA).
- Das P., Basu S. and Chakravarty I. (2008a), 'Culture, Communication and Ageing: The Emerging New Issues in Indian Gerontology', *Ageing & Society: The Indian Journal of Gerontology*, **XVIII, 1 & 2**, 14.
- Das P., Basu S. and Chakravarty I. (2008b), 'Culture, Communication and Ageing: The Emerging New Issues in Indian Gerontology', *Ageing & Society: The Indian Journal of Gerontology*, **XVIII, 1 & 2**, 14.
- Dasgupta P. (2001), *Human Well-being and the Natural Environment*, (Oxford University Press, Oxford).
- Deacon B. (2000), 'Globalization and Social Policy: The Threat to Equitable Welfare', *The Next Step in Social Development*, No. (Geneva: UNRISD), 56.
- Dean H. (2007), 'Social Policy and Human Rights: Re-thinking the Engagement', *Social Policy & Society Cambridge University Press*, **7:1, 1 - 12**.

- Degnen C. (2007), 'Minding the gap: The construction of old age and oldness amongst peers', *Journal of Aging Studies*, **21** 1.
- Denzin N. K. and Lincoln Y. V. (2008), 'The Landscape of Qualitative Research', (Los Angeles: Sage).
- Department of Information UN (2007), 'Governments urged to tap Potential of overlooked Social Groups in drive to Create Equitable Societies with Rights, Opportunities for All. ', in Department of Public Information (ed.), No. 13 February 2007(New York: United Nations).
- Desai V. and Potter R. B. (2008), 'Theories and strategies of development: Editorial introduction', in V. Desai and R. B. Potter (eds.), *The Companion to Development Studies*, (London: Hodder Education).
- Desai V. and Potter R. B. (2008a), *The Companion to Development Studies*, (Hodder Education, London).
- Devereux S. (2002), 'Social Protection for the poor: lessons from recent international experience ', *IDS Working Paper*, **142**, 42.
- DFID (2005a), 'Programme Memorandum. West Bengal: Civil Society Support Programme (CSSP) (2005 - 2010)', (Kolkata: DFID), 14.
- DFID (2005b), 'Reducing poverty by tackling social exclusion', *DFID policy paper*, (London: DFID), 31.
- DFID (2008), 'DFID India', April 2008(London HMG), 4.
- DFID (2008a), 'DFID Research Strategy 2008 - 2013', DFID), 44.
- DiMaggio P. J. and Powell W. (1983), 'The iron cage revisited institutional isomorphism and collective rationality in organizational fields', *American Sociological Review*, **48**, 14.
- Distaso A. (2005), 'Local sustainable development and well-being/quality of life. An application of the capability approach at regional level ', *5th International Conference on the Capability Approach "Knowledge and public action"*, (Paris.
- Dodds K. (2002), 'The Third World, developing countries, the South, poor countries"', in V. Desai, and Potter, R.B., (ed.), *The companion to development studies*, (London: Arnold), 3-7.
- Dyson T. (2010), *Population and Development: The Demographic Transition*, (Zed, London).
- Dyson T., Cassen R. and Visaria L. (2004), 'Twenty-First Century India: Population, Economy, Human Development, and the Environment', (Oxford: Oxford University Press), 413.
- Easterlin R. (2003), 'Building a Better Theory of Well-being', *Paradoxes of Happiness in Economics*, (University of Milano-Bicocca, 58.
- Easterly W. (2000), 'The effect of IMF and World Bank programs on poverty', (Washington, : World Bank), 27.
- Ebrahim A. (2003), *NGOs and Organizational Change, Discourse, Reporting, and Learning*, (CUP, Cambridge).
- Ebrahim A. (2004), 'NGOs and Organisational Change: The Relevance of Foucault and Bourdieu', *International Studies Association 45th Annual Convention*, (Montreal, Canada.
- Ebrahim S. (2010), 'Comments on draft thesis to V Lipman', (Delhi).

- Ebrahim S. and Smeeth L. (2005), 'Non-communicable diseases in low and middle-income countries: a priority or a distraction?', *International Journal of Epidemiology*, **34**, 5, 6.
- ECLAC UN (2007), 'Brasilia Declaration,' (Brasil: UN), 5.
- Ehrenpreis D. (2008), 'PSIA and PIA: Gauging Poverty Impacts for Effective Results', *Poverty in Focus*, No. 14(Brasilia: UNDP), 28.
- Elson D. (2001), 'The Need to Rethink Development Economics ', (Cape Town: UNRISD), 19.
- Engelman M. and Johnson S. (2007), 'Population Aging and International Development: Addressing Competing Claims of Distributive Justice', *Developing World Bioethics*, **7**, 1, 8-18.
- Escobar A. (1995), *Encountering Development: The making and unmaking of the Third World*, (Princeton University Press, Princeton).
- Estes L. C. (1999a), 'The Aging Enterprise Revisited', in Minkler M and Estes C.L. (ed.), *Critical Gerontology Perspectives Political and Moral Economy*, (New York: Baywood Publishing Company, Inc), pp135-46.
- Estes L. C. (1999b), 'Critical Gerontology and the New Political Economy of Aging', in Minkler M. and L. C. Estes (eds.), *Critical Gerontology: Perspectives from Political and Moral Economy*, (Amityville: Baywood Publishing Company), 17 - 35.
- Eyetsenmitan F. (2002), 'Life-span developmental psychology: Midlife and later years in Western and Non-Western societies.', in W. J. Lonner, Dinnel. D.L., S. A. Hayes and D. N. Sattler (eds.), *Online Readings in Psychology and Culture*, (Washington, USA: Center for Cross-Cultural Research, Western Washington University).
- Fairclough N. (1993a), 'Critical discourse analysis and the marketisation of public discourse: the universities', *Discourse and Society*, **4**, 2, 36.
- Fairclough N. (1993b), *Discourse and Social Change*, (Polity, Cambridge, UK).
- Fairclough N. (1995), *Critical Discourse Analysis*, (Longman, London).
- Fairclough N. (1996), 'Technologisation of discourse', in C. R. Caldas-Coulthard and M. Coulthard (eds.), *Texts and Practices: Readings in Critical Discourse Analysis*, (London: Routledge), 71-83.
- Fairclough N. (2000), *New Labour, New Language?*, (Routledge, London).
- FAO (2003), 'Gender analysis in macroeconomic and agricultural sector policies and programmes', *Socio Economic and Gender Analysis Programme*, (Rome: FAO), 116.
- FEG Consulting and Save the Children (2008), 'The Practitioners' Guide to the Household Economy Approach', (Johannesburg: Regional Hunger and Vulnerability Programme).
- Fenech F. (2005), 'The Factor of Ageing in International Development Co-operation', *BOLD*, **15**, 3, 8.
- Fenech F. (2007), 'Ethical Issues in Ageing', *BOLD*, **17**, 4, 1-4.
- Fennell G., Phillipson C. and Evers H. (1988), *The Sociology of Old Age*, (Open University Press, Milton Keynes).
- Ferguson J. (1994), 'The Anti-Politics Machine: "Development" and Bureaucratic Power in Lesotho', *The Ecologist*, **24**, 5, 6.

- Ferreira M. (1999), 'Ageing in Changing Societies: Africa preparing for the next millennium (AGES Workshop Report) ', (Accra: African Gerontology Society).
- Flick U. (2002), *An Introduction to Qualitative Research 2nd Edition*, (Sage, London).
- Foley M. and Edwards B. (1996), 'The paradox of civil society ', *Journal of Democracy*, **7, 3**, 14.
- Foucault M. (1989), *Archaeology of Knowledge (Originally published 1969, Trans. Alan Sheridan 1972)*, (Routledge, London).
- Foucault M. (1991), 'Governmentality', in G. Burchell, C. Gordon and P. Miller (eds.), *The Foucault Effect: Studies in Governmentality*, (Hemel Hempstead: Harvester Wheatsheaf).
- Francis P. (2001), 'Participatory Development at the World Bank: The Primacy of Process', in B. Cooke and U. Kothari (eds.), *Participation: The New Tyranny?*, (London Zed), 16.
- Fraser N. (2000), 'Redistribution, recognition and participation: towards an integrated concept of justice' ', in UNESCO (ed.), *World Culture Report: Cultural diversity, conflict and pluralism*, (Paris: UNESCO), 48-57.
- Fraser N. and Honneth A. (2003), *Redistribution or Recognition?: A Political Philosophical Exchange*, (Verso, London).
- Garcia J. and Parker R. (2006), 'From Global Discourse to Local Action: The Makings of a Sexual Rights Movement? ', *Horizontes Antropologicos*, **12, 26**, 28.
- Giffen J. and Judge R. (2010), 'Civil Society Policy and Practice in Donor Countries. An overview report commissioned by DFID', (London: INTRAC), 36.
- Gilbert T. (2006), 'Governmentality, Health and Aging: Re-figuring the Third Age ', in J. Powell and A. Wahidin (eds.), *Foucault and Aging*, (New York: Nova), 75-88.
- Gilbert T. and Gilbert L. (2004), 'Globalisation and local power: influences on health matters in South Africa', *Health Policy*, **67, 3**, 245-55.
- Glennerster H. (2007), *British Social Policy 1945 to the present*, (Blackwells, Oxford).
- Goetz A. and Sandler J. (2007), 'Swapping gender: from cross-cutting obscurity to sectoral security?', in A. Cornwall, E. Harrison and A. Whitehead (eds.), *Feminisms in Development: contradictions, contestations and challenges*, (London: Zed), 14.
- GOI (2002), 'National Human Development Report 2001', *Human Development Reports*, (New Delhi: Planning Commission Government of India), 305.
- GOI (2008a), 'Eleventh Five Year Plan (2007-2012) Inclusive Growth ', (New Delhi OUP), 306.
- GOI (2008b), 'NREGA: Operational Guidelines 2008', in Department of Rural Development (ed.), (New Delhi: Government of India), 194.
- Gorman M. (1999), 'Development and the Rights of Older People', in J. Randell, T. German and D. Ewing (eds.), *The Ageing and Development Report: Poverty, Independence and the World's Older People*, (London: Earthscan), 21.
- Gough I., McGregor A. and Camfield C. (2007), 'Theorising wellbeing in international development', in I. Gough and A. McGregor (eds.), *Wellbeing in Developing Countries: From theory to research*, (Cambridge: Cambridge University Press), 3 - 45.
- Government of India (1999), 'National Policy on Older Persons', in Ministry of Social Justice and Empowerment (ed.), (New Delhi, 20).

- GoWB (2004), 'West Bengal Human Development Report 2004', (Kolkata: Government of West Bengal,), 242.
- Gready P. and Ensor J. (2005), 'Introduction', in P. Gready and J. Ensor (eds.), *Reinventing Development: Translating Rights-Based Approaches - from theory to practice*, (London: Zed).
- Green M. (2002), 'Social Development: Issues and Approaches', in U. Kothari and M. Minogue (eds.), *Development Theory and Practice*, (Basingstoke: Palgrave), 52-70.
- Grieco M. (2001), 'Ageing and transport in Africa: a neglected issue', *Transport and Ageing Network*, (University of North Texas).
- Grillo R. D. (2006), 'Anthropologists and Development', in V. Desai and R. B. Potter (eds.), *The Companion to Development Studies*, (London: Hodder Education).
- Grindle M. and Thomas J. (1991), *Public choices and policy change: the political economy of reform in developing countries* (John Hopkins University Press, Baltimore).
- Gubrium J. F. (2005), 'The Social Worlds of Old Age', in M. Johnson (ed.), *The Cambridge Handbook of Age and Ageing*, (Cambridge: Cambridge University Press), 310-16.
- Gubrium J. F. and Holstein J. A., (eds.), (2002), 'From the Individual Interview to the Interview Society', in J. F. Gubrium and J. A. Holstein (eds.), *Handbook of Interview Research*, (London: Sage), 30.
- HAI (2009), 'The social pension in India: A participatory study on the poverty reduction impact and role of monitoring groups', *Help Age Briefing*, (London: HelpAge International), 8.
- Hall S. (2001), 'Foucault: Power, Knowledge and Discourse', in M. Wetherell, S. Taylor and S. J. Yates (eds.), *Discourse Theory and Practice: A Reader*, (London: Sage), 72-81.
- Hamdi N. (2004), *Small Change: About the art of practice and the limits of planning in cities*, (Earthscan, London).
- Hancock D. and Algozzine R. (2006), *Doing Case Study Research: A Practical Guide for Beginning Researchers* (Teachers College Press, New York).
- Harcourt W. (2006), 'The Global Women's Rights Movement: Power Politics around the United Nations and the World Social Forum', *UNRSID Programme Papers: Civil Society and Social Movements* No. 25(Geneva: UNRISD), 26.
- Harper S. (2004), 'Ageing Society ', *Oxford Today*, No. 16:2 Oxford University).
- Harper S. (2006), *Ageing Societies*, (Hodder Arnold, London).
- Hashimoto A. and Ikels C. (2005), 'Filial Piety in Changing Asian Societies', in M. Johnson (ed.), *The Cambridge Handbook of Age and Ageing*, (Cambridge: Cambridge University Press), 6.
- Held D. and McGrew A. (2003), *Globalization/Anti-Globalization*, (Polity, Malden, MA).
- Held D., McGrew A., Goldblatt D. and Perraton J. (1999), *Global Transformations: Politics, Economics and Culture*, (Polity, Cambridge).
- HelpAge India (2009), *Research and Development Journal*, **15**, **1**.
- HelpAge International (1999), *The Ageing & Development Report: Poverty, Independence and the World's Older People* (Earthscan London).

- HelpAge International (2000), 'The Mark of a Noble Society', (London: HAI), 15.
- HelpAge International (2003), 'HIV/AIDS and ageing: a briefing paper.', *Briefing Papers*, (London: HAI).
- HelpAge International (2010), 'UN adopts resolution on older people's rights', *HelpAge International eNewsletter*, (London: HelpAge International).
- Heslop A. and Gorman M. (2002), 'Chronic Poverty and Older People in the Developing World', *Working Paper*, No. 10(London: Chronic Poverty Research Centre).
- Hicks N. and Streeten P. (1979), 'Indicators of development: The search for a basic needs yardstick ', *World Development*, **7**, **6**, 14.
- Holstein M. and Minkler M. (2007), 'Critical gerontology: reflections for the 21st century ', in M. Bernard and T. Scharf (eds.), *Critical perspectives on ageing societies*, (Bristol: Policy Press), 14.
- Holzmann R. and Hinz R. (2005), *Old-Age Income Support in the 21st Century: An International Perspective on Pension Systems and Reform* (World Bank, Washington).
- Holzmann R. and Hinz R. (2008), *An International Perspective on Pension Systems and Reform: Old Age Income Support in the 21st Century*, (The World Bank, Washington, D.C.).
- Huber B. (2005), 'Implementing the Madrid Plan of Action on Ageing', in Division for Social Policy and Development (ed.), (New York: UN), 10.
- Huckin T. (2002), 'Textual silence and the discourse of homelessness', *Discourse and Society*, **Vol 13(3): 347–372**, **3**, 26.
- Hunt J. (2004), 'Aid and Development', in D. Kingsbury, J. Remenyi, J. McKay and J. Hunt (eds.), *Key Issues in Development*, (Basingstoke: Palgrave, Macmillan), 67-90.
- InfoChange (2008), 'PACS India <http://www.empowerpoor.org/bottom.asp>', InfoChange).
- James A. and James A. (2004), *Constructing Childhood: Theory, Policy and Social Practice*, (Palgrave MacMillan, Basingstoke).
- Jenson J. (2008), 'Writing Women Out, Folding Gender In: the European Union "Modernises" Social Policy', *Social Politics: International Studies in Gender, State & Society*, **15**, 1 - 23.
- Jeune B. and Christensen K. (2005), 'Biodemography and Epidemiology of Longevity', in M. Johnson (ed.), *The Cambridge Handbook of Age and Ageing*, (Cambridge: Cambridge University), 85-94.
- Johnson J. (2002), 'In-depth Interviewing', in J. F. Gubrium and J. A. Holstein (eds.), *Handbook of Interview Research* (London Sage), 16.
- Johnson M. L. (2005), 'General Editor's Preface', in M. L. Johnson (ed.), *The Cambridge Handbook of Age and Ageing*, (Cambridge: Cambridge University Press).
- Jones H., Jones N., Shaxson L. and Walker D. (2012), *Knowledge, Policy and Power in International Development: A Practical Guide*, (The Policy Press, Bristol).
- Jonson U. (2005), 'A human rights-based approach to programming', in P. Gready and J. Ensor (eds.), *Reinventing Development: Translating Rights-Based Approaches - from theory into practice*, (London/New York: Zed), 47-62.
- JRF (2004), 'Older people shaping policy and practice ', *Foundations*, (London: Joseph Rowntree Foundation), 12.

- Kabeer N. (1994), *Reversed Realities: Gender Hierarchies in Development Thought*, (Verso, London).
- Kalache A., Barreto S.M. and Keller I. (2005), 'Global Ageing', in Johnson M. (ed.), *The Cambridge Handbook of Age and Ageing*, (Cambridge: Cambridge University Press), 30 - 46.
- Kaseke E. (1999), 'Social Security and the Elderly: the African Experience', in M. Ferreira, N. Apt and A. Kirambi (eds.), *Ageing in Changing Societies: Africa preparing or the next millennium*, (Cape Town: AGES), 130-39.
- Katz S. (1996), *Disciplining Old Age: The Formation of Gerontological Knowledge*, (University Press of Virginia, Charlottesville).
- Kendall G. (2007), 'What Is Critical Discourse Analysis? Ruth Wodak in Conversation With Gavin Kendall [38 paragraphs].', *Forum: Qualitative Social Research*, **8**, 2 Art.29 [38 paragraphs].
- King N. and Calasanti T. (2006), 'Empowering the Old: Critical Gerontology and Anti-Aging in a Global Context', in J. Baars, D. Dale, C. Phillipson and A. Walker (eds.), *Aging, globalization, and inequality: the new critical gerontology*, (Amityville: Baywood Publishing Company, Inc), 139-57.
- Kinsella K. and He W. (2008), 'An Aging World:2008', *International Population Reports*, (Washington, DC: U.S. Census Bureau), 204.
- Kirchmeier F. (2006), 'The Right to Development - where do we stand? State of the debate on the right to development', *Dialogue on Globalization: Occasional Papers*, No. 23(Geneva: Freidrich-Ebert-Stiftung), 28.
- Korten D. (1990), *Getting to the 21st Century: Voluntary Action and the Global Agenda* (Kumarian Press, West Hartford, CT).
- Kothari U. and Minogue M. (2002), 'Critical Perspectives on Development: An Introduction', in U. Kothari and M. Minogue (eds.), *Development Theory and Practice: Critical Perspectives*, (Basingstoke: Palgrave), 1-15.
- Kress G. (1996), 'Representational resources and the production of subjectivity', in C. R. Caldas-Coulthard and M. Coulthard (eds.), *Texts and Practices: Readings in Critical Discourse Analysis*, (London: Routledge).
- Krippendorff K. (1980), *Content Analysis: An Introduction to its Methodology.*, (Sage, Beverley Hills, CA).
- Kusek J. and Rist R. (2004), 'Ten Steps to a Results-based Monitoring and Evaluation System: a handbook for development practitioners', (Washington: World Bank), 268.
- Laws A. and McLeod R. (2004), 'Case study and grounded theory: sharing some alternative qualitative research methodologies with systems professionals', *22nd International Conference of the System Dynamics Society*, (Oxford).
- Lazar M. (2005), 'Politicizing Gender in Discourse: Feminist Critical Discourse Analysis as Political Perspective and Praxis ', in M. Lazar (ed.), *Feminist Critical Discourse Analysis: Gender, Power and Ideology* (Basingstoke: Palgrave Macmillan), 260.
- Lipman V. (2005), 'Teaching Young Dogs Old Tricks: education and the absence of older people in the discourse on development (MA dissertation)', (Oxford: Oxford Brookes University), 67.

- Lipman V. (2005a), 'Rights for the Invisible: Older People and the Human Rights Project', *Generations Review: Journal of the British Society of Gerontology*, **15**, 4, 42-47.
- Liu L.-J. and Guo Q. (2008), 'Life satisfaction in a sample of empty-nest elderly: a survey in the rural area of a mountainous county in China ', *Journal Quality of Life Research*,, **17 Number 6 / August, 2008** 823-30
- Lloyd-Sherlock P. (2004), 'Ageing, development and social protection - generalisations, myths and stereotypes. ', in P. Lloyd-Sherlock (ed.), *Living Longer: Ageing, Development and Social Protection*, (London: Zed Books).
- Lloyd-Sherlock P. (2010), *Population Ageing and International Development: from generalisation to evidence*, (The Policy Press, Bristol).
- Longhurst R. (2003), 'Semi-structured Interviews and Focus Groups', in N. Clifford and G. Valentine (eds.), *Key Methods in Geography*, (London: Sage), 117-32.
- Lutz W., Sanderson, W., Scherbov, S., (2008), 'The coming acceleration of global population ageing ', *Nature*, **451**, 4.
- Makoni S. (2008), 'Aging in Africa: A Critical Review', *Journal of Cross-Cultural Gerontology*, **23**, 199 - 209.
- Mama A. (2007), 'Critical connections: feminist studies in African contexts', in A. Cornwall, E. Harrison and A. Whitehead (eds.), *Feminisms in development: contradictions, contestations & challenges*, (London: Zed Books Ltd), 11.
- March C., Smyth I. and Mukhopadhyay M. (1999), *A Guide to Gender-Analysis Frameworks*, (OXFAM, Oxford).
- Mason J. (2002), *Qualitative Researching*, (Sage).
- Matthews L. (2011), 'Older People and Human Rights', *BIHR Expert Series*, (London: British Institute of Human Rights), 51.
- Mayr A. (2008), *Language and Power: An Introduction to Institutional Discourse*, (Continuum, London).
- McGadney-Douglass B. F. and Douglass R. L. (2008), 'Collective Familial Decision-Making In Times Of Trouble: Intergenerational Solidarity in Ghana ', *Journal of Cross-Cultural Gerontology*, No. 2 Springer Netherlands), 147-60.
- McIlwaine C. and Datta K. (2003), 'From Feminising to Engendering Development', *Gender, Place & Culture: A Journal of Feminist Geography*, **10**, 4, 15.
- Megret F. (in press 2011), 'The Human Rights of Older Persons: A Growing Challenge', *Human Rights Law Review*.
- Merriam (1988), *Case Study Research in Education. A Qualitative Approach*, (Jossey-Bass Inc., San Francisco).
- Minkler M. and Cole R. (1999), 'Political and Moral Economy: Getting to Know One Another', in Minkler M and Estes C. (ed.), *Critical Gerontology: Perspectives from Political and Moral Economy*, (New York: Baywood Publishing Company,), pp37 - 51.
- Mkandawire T. (2004), 'Social Policy in a Development Context', (Basingstoke, Hampshire: Palgrave Macmillan).
- Molyneux M. (1998), 'Analysing Women's Movements', in C. Jackson and R. Pearson (eds.), *Feminist Visions of Development: Gender Analysis and Policy*, (Oxford: Routledge), 65 - 88.

- Molzahn A., Kalfoss M., Makaroff K. and Skevington S. (2010), 'Comparing the importance of different aspects of quality of life to older adults across diverse cultures ', *Age and Ageing*, 7.
- Moser C. (1993), *Gender Planning and Development: Theory, Practice, and Training* (Routledge, London).
- Moser C. and Moser A. (2005), 'Gender mainstreaming since Beijing: a review of success and limitations in international institutions', *Gender and Development*, **13**, 2, 10.
- Mukhopadhyay M. (2007), 'Mainstreaming gender or "streaming" gender away: feminists marooned in the development business', in A. Cornwall, E. Harrison and A. Whitehead (eds.), *Feminisms in development: contradictions, contestations & challenges*, (London: Zed Books Ltd), 15.
- Mukhopadhyay M. and Meer S. (2004), *Creating Voice and Carving Space: redefining governance from a gender perspective*, (KIT, Amsterdam).
- Naidoo K. (2009), *Boiling Point: Can citizen action save the world?*, (Dag Hammarskjold Foundation, Uppsala).
- Narman A. and Simon D. (1999a), 'Development as Theory and Practice: contemporary perspectives on development and development cooperation', (Essex: Longman).
- Narman A. and Simon D. (1999b), 'Introduction', in D. Simon and A. Narman (eds.), *Development as Theory and Practice: contemporary perspectives on development and development cooperation*, (Harlow, Essex: Longman).
- Nasreen Z. and Togawa M. (2002), 'Politics of Development: 'Pahari Bengali' Discourse in the Chittagong Hill Tracts', *Journal of International Development and Cooperation*, **9**, 1, 16.
- Nayar P. K. B. (2005), 'Senior Grassroots Organizations in India', in P. S. Liebeg and S. I. Rajan (eds.), *An Aging India: Perspectives, Prospects & Policies*, (Jaipur: Rowat Publications), 20.
- Neysmith S. and Edwardh J. (1984), 'Economic Dependency in the 1980s: its impact on the third world elderly. ', *Ageing & Society*, **4**, 1, 21-44.
- Nussbaum M. (2000), *Women and Human Development: The Capabilities Approach*, (Cambridge University Press, Cambridge).
- O'Farrell C. (2007), 'Michel Foucault.com Key concepts'.
- Okatcha K. (1999), 'Impact of HIV/AIDS on older persons in Africa. ', in M. Ferreira (ed.), *Ageing in Changing Societies: Africa preparing for the next millennium AGES Workshop Report* (Nairobi: AGES), 87-102.
- Okoye O. U. (2005), 'The Erosion of Traditional Forms of Care for the Elderly and its Implications for the Elderly in Nigeria', 12.
- Olshansky S. J., Biggs S., Achenbaum W. A., Davison G. C., Fried L., Gutman G., Kalache A., Khaw K.-T., Fernandez A., Rattan S. I. S., Guimarães R. M., Milner C., I and Butler R. (2011), 'The Global Agenda Council on the Ageing Society: Policy Principles', *Global Policy*, **2**, 1, 9.
- Osaghae E. (2009), 'Identity, State, Citizenship and Inclusion', *Vlth International Conference on Citizenship and Governance Challenges for Social Inclusion*, (University of North Bengal, Siliguri: PRIA).
- Østergaard L. (1992), 'Gender', in L. Østergaard (ed.), *Gender and Development: A Practical Guide*, Routledge), 220.
- Pal S. (2004), 'Effects of domestic arrangements on the welfare on Indian Elderly'.

- Pal S. and Palacios R. (2008), 'Understanding Poverty among the Elderly in India: Implications for Social Pension Policy', *IZA Discussion Paper Series*, **3431** 34.
- Palloni A. (2001), 'Living Arrangements of Older Persons. Population Ageing and Living Arrangements of Older Persons: Critical Issues and Responses', (New York: UN DESA).
- Parker R. (1993), 'Another Point of View: A Manual on Gender Analysis Training for Grassroots Workers.', (New York: UNIFEM).
- Pereira C. (2002), 'Configuring 'Global', 'National', and 'Local' in Governance Agendas and Women's Struggles in Nigeria', *Social Research*, **69**, **3**, 24.
- Peshkin A. (1988), 'In Search of Subjectivity - One's Own', *Educational Research*, **October**, **7**, 4.
- Phillipson C. (2003), 'Globalisation and the Future of Ageing: Developing a Critical Gerontology', *Sociological Research Online*, **8**, **4**.
- Phillipson C. (2005), 'The Political Economy of Old Age', in M. L. Johnson (ed.), *The Cambridge Handbook of Age and Ageing*, (Cambridge: Cambridge University Press), pp502 - 09.
- Pitanguy J. (2002), 'Bridging the Local and Global: Feminism in Brazil and the International Human Rights Agenda', *Social Research*, **69**, **3**, 16.
- Pool I. (2006), 'The Way Forward: Changes in Population Structure ', *The ICPD Vision: How Far Has the 11-Year Journey Taken Us? Report of UNFPA Panel Discussion at the IUSSP XXV International Population Conference*, (Tours, France: UNFPA), 62.
- Pool I. (2008), 'OIA, Diff mixes num and struct ageing April 2008. Email to V. Lipman', (London, email
- Powell J. (2001), 'Theorizing Gerontology: The Case of Old Age, Professional Power, and Social Policy in the United Kingdom', *Journal of Aging and Identity*, **6**, **3**, 18.
- Powell J. (2010), 'The Power of Global Ageing', *Ageing International*, **35**, 14.
- Powell J. and Biggs S. (2003), 'Foucauldian Gerontology: A Methodology for Understanding Aging', *Electronic Journal of Sociology*
- Powell J. L. and Wahidin A. (2006), 'Foucault and Aging', (New York: Nova Science Publishers).
- Prasad R. (1987), 'Problems of the Aged in India: Some Reflections', in M. L. Sharma and T. M. Dak (eds.), *Aging in India: challenge for the society*, (Delhi: Ajanta), 7.
- Rai S. M. (2007), *The Gender Politics of Development: Essays in Hope and Despair* (Zed Publications, London).
- Randel J., German T. and Ewing D. (1999), 'The Ageing & Development Report: Poverty, Independence and the World's Older People ', (London: Earthscan), 201.
- Rapley T. (2007), *Doing Conversation and Document Analysis*, (SAGE Publications Ltd., London).
- Reid E. (2005), 'Transformational development and the wellbeing of women', in P. Thomas (ed.), *Women, Gender and Development in the Pacific - Papers*, (Canberra: Development Studies Network), 8.
- Remenyi J. (2004), 'What is Development?', in D. Kingsbury, J. Remenyi., J. McKay and J. Hunt (eds.), *Key Issues in Development* (Basingstoke: Palgrave, Macmillan), 22-44.

- Riskin C. and Saxena N. (2006), 'Evaluation of the National Human Development Report System. Case Study: India ', UNDP), 32.
- Robson C. (1993), *Real World Research: A Resource for Social Scientists and Practitioner-Researchers*, (Blackwell, Oxford).
- Rodney W. (1973), *How Europe Underdeveloped Africa*, (Bogle-L'Ouverture, Dar-es-Salaam).
- Saith R. (2007a), 'Capabilities: The Concept and its Implementation', in F. Stewart, R. Saith and B. Harriss-White (eds.), *Defining Poverty in the Developing World*, (Basingstoke: Palgrave Macmillan), 55-74.
- Saith R. (2007b), 'Social Exclusion: The Concept and Application to Developing Countries', in F. Stewart, R. Saith and B. Harriss-White (eds.), *Defining Poverty in the Developing World*, (Basingstoke: Palgrave Macmillan), 75-90.
- Sanchez N. (2008), 'Promoting Active Ageing: Through Implementation of Policy and Capability Building ', (London: Development Studies Association).
- Schröder-Butterfill E. and Kreager P. (2005), 'Actual and 'de facto' Childlessness in Old Age: Evidence and Implications from East Java, Indonesia ', *Population and Development Review* 31, **31**, **1**, pp19-55.
- Scott T., Minchiello V. and Browning C. (1998), 'Secondary school students' knowledge of and attitudes towards older people: does an education intervention programme make a difference ', *Ageing & Society*, **18 Part 2**, 16.
- Seale C. (1999), *The Quality of Qualitative Research*, (SAGE, London).
- Selwyn N. and Robson K. (1998), 'Using e-mail as a research tool', *Social Research Update*, No. 21(Guildford: University of Surrey).
- Sen A. (1999), *Development as Freedom*, (Oxford University Press).
- Sen K. (1994), *Ageing: Debates on Demographic Transition and Social Policy* (Zed Books, London,).
- Sen K. (2000), 'Older women – the socio-economic realities ', *Bulletin Medicus Mundi Switzerland*, **76 April 2000**.
- Sengupta A. K. (1999), 'Study on the current state of progress in the implementation of the right to development', *Commission on Human Rights: Open-ended Working Group on the Right to Development, Geneva, 13-17 September 1999*, (Geneva: UN), 86 paragraphs.
- Seshia S. and Scoones I. (2003), 'Tracing policy connections: the politics of knowledge in the Green Revolution and biotechnology eras in India', *IDS Working Paper*, No. 188(Brighton: IDS), 35.
- Shaibu S. and Wallhagen M. I. (2005), 'Family caregiving of the elderly in Botswana: Boundaries of culturally acceptable options and resources ', *Journal of Cross-Cultural Gerontology*, **17**, **2 June 2005**, 139 - 54.
- Shuy R. (2002), 'In-person versus Telephone Interviewing', in J. F. Gubrium and J. A. Holstein (eds.), *Handbook of Interview Research: Context & Method*, (London: Sage), 18.
- Sida (2006), 'Annual Report', (Stockholm: Swedish International Development Agency), 204.
- Sidorenko A. (2008), 'informal interview held at UN, NYC', (New York: Head of the UN Focal Point on Ageing:).
- Silverman D. (1997), *Doing Qualitative Research*, (SAGE, London).

- Silverman D. (2005), *Doing Qualitative Research*, (SAGE, London).
- Skeldon R. (1999), 'Ageing of Rural Populations in South-East and East Asia, Part 1', *SD Dimensions*, No. April 1999(Rome: FAO).
- Skinner E. J. and McSharry P. E. (2005), 'Is living longer always a good thing? The anomaly of longevity and human development in an ageing society', *an Eldis document*, **August 2005**.
- Smith M. (1998), *Social Science in Question: Towards a Postdisciplinary Framework*, (Sage, London).
- Sokolovsky J. (2009), *The cultural context of aging: worldwide perspectives*, (Greenwood, Westport).
- Standing H. (2007), 'Gender, myth and fable: the perils of mainstreaming in sector bureaucracies', in A. Cornwall, E. Harrison and A. Whitehead (eds.), *Feminisms in Development: contradictions, contestations and challenges*, (London: Zed Books), 12.
- Stein C. and Moritz I. (1999), 'A life course perspective of maintaining independence in older age', (Geneva: World Health Organisation), 73.
- Steiner H. J. and Alston P. (2000), *International Human Rights in Context: Law, Politics, Morals*, (Oxford University Press, Oxford).
- Stiglitz J. (1998), 'Towards a New Paradigm for Development: Strategies, Policies, and Processes', *1998 Prebisch Lecture at UNCTAD*, (Geneva, 46).
- Stiglitz J. (2007), *Making Globalization Work*, (Penguin, London).
- Stloukal L. (2004), 'Population ageing in developing regions: focusing on the oldest old', *SD Dimensions*, (Rome: FAO), 2.
- Streeten P. (1981), *Development Perspectives*, (MacMillan Press Ltd, London).
- Streeten P. (2001), *Globalisation: Threat or Opportunity*, (Copenhagen Business School Press, Copenhagen).
- Stuart E. (2007), 'Blindspot: The continued failure of the World Bank and IMF to fully assess the impact of their advice on poor people', *Joint NGO Briefing Note*, 12.
- Tajfel H. (1978), *Differentiation between social groups: Studies in the social psychology of intergroup relations*, (Academic Press, London).
- Taplin A. (2008), 'Why are they laughing and should I laugh with them? – Transcending global local divides through the use of interpreters ', University of Southampton).
- Taylor S. (2003), 'Discourses of difference in gender equity policy in Australian education: feminism and marginalisation ', *Melbourne Studies in Education*, **44, 2**, 18.
- Tellis W. (1997), 'Introduction to Case Study ', *The Qualitative Report [On-line serial]*, **3, 2**, 68 paragraphs.
- Thane P. (2005), *The Long History of Old Age*, (Thames & Hudson, London).
- Theis J. and O'Kane C. (2005), 'Children's participation, civil rights and power', in P. Gready and J. Ensor (eds.), *Reinventing Development? Translating Rights-Based Approaches - from theory into practice*, (London: Zed), 156-70.
- Thomas P. (2005), 'Introduction: Women and gender mainstreaming', in P. Thomas (ed.), *Women, Gender and Development in the Pacific - Papers*, (Canberra: Development Studies Network).

- Thomson M. and Goldsmith J. E. (2004), 'Age Concern East Midlands: Evaluation Report B&ME Elders Project', (London: Anona Consultancy), 42.
- Tinker I. (1997), 'The Making of a Field: Advocates, Practitioners and Scholars', in N. Visvanathan, L. Duggan, L. Nisonoff and N. Wiegiersma (eds.), *The Women, Gender & Development Reader*, (London: Zed), 10.
- Tomasevski K. (1989), *Development and Human Rights*, (Pinter Publishers, London).
- Torres S. (2006), 'Making sense of the construct of successful ageing: the migrant experience', in S. O. Daatland and S. Biggs (eds.), *Ageing and Diversity - multiple pathways and cultural migrations*, (Bristol: Policy Press).
- Tout K. (1989), *Ageing in Developing Countries*, (OUP/HelpAge International, Oxford).
- Townsend P. (1981), 'The Structured Dependency of the Elderly: A Creation of Social Policy in the Twentieth Century', *Ageing & Society*, **1, 1**, 23.
- Treas J. and Logue B. (1986), 'Economic Development and the Older Population', *Population and Development Review*, **12, 4**, 645-73.
- Tsikata D. (2007), 'Announcing a new dawn prematurely? Human rights feminists and the rights-based approaches to development', in A. Cornwall, E. Harrison and A. Whitehead (eds.), *Feminisms in development: contradictions, contestations & challenges* (London: Zed Books Ltd), 13.
- UN-CSD (2007), 'Report on the 45th Session ', in E. S. Council (ed.), (New York: UN).
- UN-DESA (2002), 'Report of the Second World Assembly on Ageing, Madrid, 8-12 April 2002', in Department of Economic and Social Affairs (ed.), (New York: UN), 79.
- UN-DESA (2005), 'Population Challenges and Development Goals', (New York UN), 70.
- UN-DESA (2007), 'World Economic and Social Survey 2007 Development in an Ageing World', (New York, 180.
- UN-DESA (2007a), 'World Population Prospects The 2006 Revision Executive Summary', in Department of Economic and Social Affairs: Population Division (ed.), (New York: UN), 21.
- UN-DESA (2008), 'Guide to the National Implementation of the Madrid International Plan of Action on Ageing', (New York: United Nations), 161.
- UN-ECOSOC (1999), 'Gender and ageing: problems, perceptions and policies', (New York: UN).
- UN-ECOSOC (2006), 'Modalities for the review and appraisal of the Madrid International Plan of Action on Ageing', in ECOSOC (ed.), No. Agenda item 3 (b) (iii)(New York UN), 3.
- UN (1961), 'United Nations Development Decade: A programme for international economic cooperation (I) ', (New York, 2.
- UN (1971), 'Agenda item 2842 - Question of the elderly and the aged', (New York: UN General Assembly), 1.
- UN (1979), 'CEDAW', in Department of Economic and Social Affairs (ed.), (New York: UN).
- UN (1982), 'IPAA', (New York).
- UN (1982), 'Question of Aging Resolution ', (New York: UN), 2.
- UN (1985), 'Report of the World Conference to Review and Appraise the Achievements of the United Nations Decade for Women: Equality, Development and Peace ', (New York: UN), 79.

- UN (1986), 'Declaration on the Right to Development', (Geneva: UN).
- UN (1990), 'International Development Strategy for the Fourth United Nations Development Decade', (New York: UN), 10.
- UN (1992), 'Proclamation on Ageing', (New York: United Nations).
- UN (1995a), 'Fourth World Conference on Women: Action for Equality, Development and Peace, Platform for Action', (Beijing, China: UN), 132.
- UN (1995b), 'General Comment 6 The economic, social and cultural rights of older persons 08/12/95, ' in Office of the High Commissioner for Human Rights (ed.), (Geneva: UN).
- UN (1995c), 'International Year of Older Persons: towards a society for all ages A/Res/50/141 ', (New York: UN), 2.
- UN (1995d), 'Report of the World Summit for Social Development (Copenhagen, 6-12 March 1995), ' (New York: UN), 132 paras.
- UN (2000), 'United Nations Millennium Declaration,' *General Assembly: 55th Session: Agenda item 60 (b)*, (New York: UN), 9.
- UN (2002), 'Report of the Second World Assembly on Ageing: Madrid, 8-12 April 2002', (New York: United Nations), 79.
- UN (2005), '2005 World Summit Outcome General Assembly 14 -16 September 2005 Sixtieth session ', in UN Secretariat (ed.), (New York: United Nations.),
- UN (2010), 'CEDAW', in DESA (ed.), (New York: UN).
- UN ECOSOC (2006), 'Major Developments in the area of ageing since the Second World Assembly on Ageing: report of the Secretary-General. Commission on Social Development. Accession no: E/CN.5/2007/1 ', (New York: UN), 19.
- UNDP (1990), 'Human Development Report 1990 Concept and Measurement of Human Development', (New York: UNDP), 189.
- UNDP (2003), 'Human Development Report 2003 - Millennium Development Goals: A Compact Among Nations to End Human Poverty', (New York: UNDP), 368.
- UNDP (2007a), 'Human Development Report 2007/2008 - Fighting climate change: Human solidarity in a divided world', (New York: UNDP), 399.
- UNDP (2007b), 'Making Globalization Work for All: UNDP Annual Report 2007', (New York: United Nations Development Programme), 48.
- UNDP (2008), 'MDG Monitor: track, learn, support. Monitoring the Millennium Development Goals', in UNDP (ed.), (New York: United Nations).
- UNDP (2010), 'Human Development Report 2010. The Real Wealth of Nations: Pathways to Human Development', (New York: UNDP), 238.
- UNEG (2005), 'Standards for Evaluation in the UN System', (New York: United Nations Evaluation Group), 23.
- UNFPA (2002), 'Population Ageing and Development, Social, Health and Gender Issues. Report of an Expert Group Meeting ', *Population and Development Strategies Series* (Valleta: UNFPA).
- UNFPA (2007), 'Annual Report', (New York: UNFPA), 36.
- United Nations (1948), 'Universal Declaration of Human Rights', (Geneva: UN).
- United Nations (1970), 'International Development Strategy for the Second United Nations Development Decade,' in G. Assembly (ed.), (New York: UN), 11.
- United Nations (1990a), 'Annex: International Development Strategy for the Fourth United Nations Development Decade,' *General Assembly Resolutions*, 10.

- United Nations (2006), 'Guidelines for review and appraisal of the Madrid International Plan of Action on Ageing: Bottom-up participatory approach', (New York: United Nations), 96.
- UNOHCHR (2000), 'Annual Report 2000 - Implementation of activities and use of funds: Human Rights', (Geneva: OHCHR), 166.
- Unterhalter E., North A., Karlsson J., Onsongo J. and Makinda H. (2008), 'Working paper 1: Four forms of disconnection: Negotiating gender, education and poverty reduction in schools in Kenya and South Africa', *Gender, education and global poverty reduction strategies*, (London: Institute of Education), 38.
- USAID (2006), 'FY 2006 Operational Plans', (Washington, DC,: USAID).
- van den Bergh J. C. J. M. (2007), 'Abolishing GDP', *Tinbergen Institute Discussion Paper, TI 2007-019/3*, 27.
- van Dijk T. (1993), 'Principles of Critical Discourse Analysis', *Discourse and Society*, **4**, 2, 34.
- van Dijk T. A. (1996), 'Discourse, power and access', in C. Caldas-Courthard and M. Courthard (eds.), *Texts and Practices: Readings in Critical Discourse Analysis*, (London: Routledge), 21.
- van Dijk T. (1993), 'Editor's Foreword', *Discourse and Society*, **4**, 2, 2.
- van Kerkhoff L. and Szlezak N. (2006), 'Linking local knowledge with global action: examining the Global Fund to Fight AIDS, Tuberculosis and Malaria through a knowledge system lens', *Bulletin of the World Health Organization: The International Journal of Public Health*, **84**, 7.
- van Leeuwen T. (1993), 'Genre and Field', *Discourse and Society*, **4**, 2, 32.
- Vavrus F. (2002), 'Constructing Consensus: The Feminist modern and the reconstruction of gender', *Current Issues in Comparative Education*, **5**, 1, 13.
- Vera-Sanso P. (2004a), 'Modelling Intergenerational Relations in South India', *Generations Review*, **14**, 1, 21-23.
- Vera-Sanso P. (2004b), 'They don't need it, and I can't give it: filial support in South India', in P. Kreager and E. Schroeder-Butterfill (eds.), *The Elderly Without Children*, Volume 6, Fertility, Reproduction and Sexuality, (Oxford: Bergahan Press), 29.
- Vera-Sanso P., Suresh V., Hussain M., Henry S. and Harriss-White B. (2010), 'Ageing, poverty and neoliberalism in urban South India', *nda findings*, No. 5(Sheffield: new dynamics of ageing), 8.
- Vera-Sanso P. and Sweetman C. (2009), 'Editorial', *Gender & Development*, **17**, 3, 12.
- Vermani S. (2004), 'Changing Interaction and Intra-personal relations of elders in the family', *Ageing & Society: The Indian Journal of Gerontology*, **XVI**, **IV**.
- Victor C. (1987), *Old age in modern society: a textbook of social gerontology* (Beckenham, Kent).
- Victor C. (2005), *The Social Context of Ageing. A Textbook of Gerontology*, (Routledge, Abingdon).
- Vincent J. A. (2006), 'Globalization and Critical Theory: Political Economy of World Population Issues', in J. Baars, D. Dale, C. Phillipson and A. Walker (eds.), *Ageing, globalization, and inequality: the new critical gerontology*, (Amityville: Baywood Publishing Company (Inc)), 245-72.

- Visvanathan N. (2005), 'General Introduction', in N. Visvanathan, L. Duggan, L. Nisonoff and N. Wiegersma (eds.), *The Women, Gender and Development Reader*, (London: Zed).
- Vos R., Ocampo J. A. and Cortez A. L. (2008), *Ageing and Development*, (Zed Books, London).
- Walker A. (1981), 'Towards a political economy of old age', *Age & Society*, **1**, **1**, 21.
- Walker A. (2005), 'Towards an international political economy of ageing', *Ageing & Society*, **25**, 815-39.
- Walker A. and Deacon B. (2003), 'Economic Globalization and Policies on Aging,' *Journal of Societal and Social Policy*, **2**, **2**, 1-18.
- Wallerstein I. (2004), *World-Systems Analysis: An Introduction*, (Duke University Press, Durham, NC).
- Warnes T. (2004), 'Older Migrants as Catalysts of Social Policy change in Europe'.
- Warren C. (2002), 'Qualitative Interviewing', in J. F. Gubrium and J. A. Holstein (eds.), *Handbook of Interview Research*, (London: Sage).
- Weber R. P. (1985), *Basic Content Analysis*, (Sage Publications Ltd. , Beverley Hills).
- Wetherell M., Taylor S. and Yates S. J. (2001), 'Discourse Theory and Practice: A Reader', (London: Sage).
- WHO (2002a), 'Active Ageing: A policy framework', (Geneva: World Health Organisation), 60.
- WHO (2002b), 'The International Network for the Prevention of Elder Abuse/Ageing and Life Course ', (Geneva: WHO).
- WHO (2006), 'Global Network of Age-Friendly Cities', (Geneva: WHO), 2.
- Widdowson H. G. (2004), *Text, Context, Pretext: Critical issues in discourse analysis*, (Blackwell, Oxford).
- Williams A. (2003), *Ageing and Poverty in Africa: Ugandan Livelihoods in a Time of HIV/AIDS* (Ashgate Publishing, Aldershot, Hampshire).
- Wodak R. (1996), 'The genesis of racist discourse in Austria since 1989 ', in C. R. Caldas-Coulthard and M. Coulthard (eds.), *Texts and Practices: Readings in Critical Discourse Analysis*, (London: Routledge), 23.
- Wodak R. and Meyer M. (2001), *Methods of Critical Discourse*, (SAGE, London).
- World Bank (1994), *Averting the old age crisis: policies to protect the old and promote growth*, (World Bank, Washington, D.C.).
- World Bank (2007), 'World Development Indicators', (Washington: World Bank), 21.
- World Bank (2008), 'Synopsis of World Development Reports (1995 - 2005)', 9.
- Wuthnow R., Hunter J. D., Bergesen A. and Kurzweil E. (1984), 'Cultural Analysis: The Work of Peter L. Berger, Mary Douglas, Michel Foucault and Jurgen Habermas', (Boston: Routledge & Kegan Paul).
- Yap M. T., Thang L.L. and Traphagan J.W. (2006), 'Introduction: Aging in Asia—Perennial Concerns on Support and Caring for the Old ', *Journal of Cross-Cultural Gerontology - publisher Springer Netherlands*, **20**, **4** 257 - 67.
- Yin R. K. (1994), *Case Study Research: Design and Methods*, (Sage Publications, Thousand Oaks, California).
- Yin R. K. (2003), *Case Study Research: Design and Methods 3rd edition*, (Sage, London).

Zelenev S. (2008a), 'Convention on the Rights of Older Persons: How Feasible Is the Option? ', *Global Action on Aging*, (New York: GAA).

Zelenev S. (2008b), 'The Madrid Plan: A Comprehensive Agenda for an Ageing World', (New York: DESA, UN), 196.

Glossary of Indian terms

Backward classes – referred to in formal documentation as ‘Other Backward Classes’ (OBCs), they are one of the groups of citizens defined in the Constitution of India (1949) requiring particular support based on their ‘social and economic condition’.

Panchayat System - is the elected decentralised local government system of India, established by the 1949 Constitution. It consists of three tiers – the village council, the block council and the district.

Scheduled Castes (‘SC’s) and **Scheduled Tribes (‘ST’s)** – are the legal and constitutional names given to Indian population groupings explicitly recognised by the Indian Constitution for receiving constitutional privileges, security and benefits in independent India in recognition of their past history of inferior treatment in India. As at the 2001 Census SCs/STs together comprised over 24% of India’s population, with SCs at over 16% and ST over 8%. There are over 600 tribal groups. The Scheduled Castes are not a homogeneous group and are divided into many castes and sub-castes, as well as by language and geography.

Appendices

Appendix 1: Millennium Development Goals Indicators

Effective 15 January 2008

Millennium Development Goals (MDGs)	
Goals and Targets (from the Millennium Declaration)	Indicators for monitoring progress
Goal 1: Eradicate extreme poverty and hunger	
Target 1.A: Halve, between 1990 and 2015, the proportion of people whose income is less than one dollar a day	1.1 Proportion of population below \$1 (PPP) per day 1.2 Poverty gap ratio 1.3 Share of poorest quintile in national consumption
Target 1.B: Achieve full and productive employment and decent work for all, including women and young people	1.4 Growth rate of GDP per person employed 1.5 Employment-to-population ratio 1.6 Proportion of employed people living below \$1 (PPP) per day 1.7 Proportion of own-account and contributing family workers in total employment
Target 1.C: Halve, between 1990 and 2015, the proportion of people who suffer from hunger	1.8 Prevalence of underweight children under-five years of age 1.9 Proportion of population below minimum level of dietary energy consumption
Goal 2: Achieve universal primary education	
Target 2.A: Ensure that, by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling	2.1 Net enrolment ratio in primary education 2.2 Proportion of pupils starting grade 1 who reach last grade of primary 2.3 Literacy rate of 15-24 year-olds, women and men
Goal 3: Promote gender equality and empower women	
Target 3.A: Eliminate gender disparity in primary and secondary education, preferably by 2005, and in all levels of education no later than 2015	3.1 Ratios of girls to boys in primary, secondary and tertiary education 3.2 Share of women in wage employment in the non-agricultural sector 3.3 Proportion of seats held by women in

	national parliament
Goal 4: Reduce child mortality	
Target 4.A: Reduce by two-thirds, between 1990 and 2015, the under-five mortality rate	4.1 Under-five mortality rate 4.2 Infant mortality rate 4.3 Proportion of 1 year-old children immunised against measles
Goal 5: Improve maternal health	
Target 5.A: Reduce by three quarters, between 1990 and 2015, the maternal mortality ratio	5.1 Maternal mortality ratio 5.2 Proportion of births attended by skilled health personnel
Target 5.B: Achieve, by 2015, universal access to reproductive health	5.3 Contraceptive prevalence rate 5.4 Adolescent birth rate 5.5 Antenatal care coverage (at least one visit and at least four visits) 5.6 Unmet need for family planning
Goal 6: Combat HIV/AIDS, malaria and other diseases	
Target 6.A: Have halted by 2015 and begun to reverse the spread of HIV/AIDS	6.1 HIV prevalence among population aged 15-24 years 6.2 Condom use at last high-risk sex 6.3 Proportion of population aged 15-24 years with comprehensive correct knowledge of HIV/AIDS 6.4 Ratio of school attendance of orphans to school attendance of non-orphans aged 10-14 years
Target 6.B: Achieve, by 2010, universal access to treatment for HIV/AIDS for all those who need it	6.5 Proportion of population with advanced HIV infection with access to antiretroviral drugs
Target 6.C: Have halted by 2015 and begun to reverse the incidence of malaria and other major diseases	6.6 Incidence and death rates associated with malaria 6.7 Proportion of children under 5 sleeping under insecticide-treated bednets 6.8 Proportion of children under 5 with fever who are treated with appropriate anti-malarial drugs 6.9 Incidence, prevalence and death rates associated with tuberculosis 6.10 Proportion of tuberculosis cases detected and cured under directly observed

	treatment short course
Goal 7: Ensure environmental sustainability	
Target 7.A: Integrate the principles of sustainable development into country policies and programmes and reverse the loss of environmental resources	7.1 Proportion of land area covered by forest 7.2 CO2 emissions, total, per capita and per \$1 GDP (PPP) 7.3 Consumption of ozone-depleting substances 7.4 Proportion of fish stocks within safe biological limits 7.5 Proportion of total water resources used
Target 7.B: Reduce biodiversity loss, achieving, by 2010, a significant reduction in the rate of loss	7.6 Proportion of terrestrial and marine areas protected 7.7 Proportion of species threatened with extinction
Target 7.C: Halve, by 2015, the proportion of people without sustainable access to safe drinking water and basic sanitation	7.8 Proportion of population using an improved drinking water source 7.9 Proportion of population using an improved sanitation facility
Target 7.D: By 2020, to have achieved a significant improvement in the lives of at least 100 million slum dwellers	7.10 Proportion of urban population living in slums ^b
Goal 8: Develop a global partnership for development	
<p>Target 8.A: Develop further an open, rule-based, predictable, non-discriminatory trading and financial system</p> <p>Includes a commitment to good governance, development and poverty reduction - both nationally and internationally</p> <p>Target 8.B: Address the special needs of the least developed countries</p> <p>Includes: tariff and quota free access for the least developed countries' exports; enhanced programme of debt relief for heavily indebted poor countries (HIPC) and cancellation of official bilateral debt; and more generous ODA for countries</p>	<p><i>Some of the indicators listed below are monitored separately for the least developed countries (LDCs), Africa, landlocked developing countries and small island developing States.</i></p> <p><u>Official development assistance (ODA)</u></p> <p>8.1 Net ODA, total and to the least developed countries, as percentage of OECD/DAC donors' gross national income</p> <p>8.2 Proportion of total bilateral, sector-allocable ODA of OECD/DAC donors to basic social services (basic education, primary health care, nutrition, safe water and sanitation)</p> <p>8.3 Proportion of bilateral official development assistance of OECD/DAC donors that is untied</p> <p>8.4 ODA received in landlocked developing countries as a proportion of their gross</p>

<p>committed to poverty reduction</p> <p>Target 8.C: Address the special needs of landlocked developing countries and small island developing States (through the Programme of Action for the Sustainable Development of Small Island Developing States and the outcome of the twenty-second special session of the General Assembly)</p> <p>Target 8.D: Deal comprehensively with the debt problems of developing countries through national and international measures in order to make debt sustainable in the long term</p>	<p>national incomes</p> <p>8.5 ODA received in small island developing States as a proportion of their gross national incomes</p> <p><u>Market access</u></p> <p>8.6 Proportion of total developed country imports (by value and excluding arms) from developing countries and least developed countries, admitted free of duty</p> <p>8.7 Average tariffs imposed by developed countries on agricultural products and textiles and clothing from developing countries</p> <p>8.8 Agricultural support estimate for OECD countries as a percentage of their gross domestic product</p> <p>8.9 Proportion of ODA provided to help build trade capacity</p> <p><u>Debt sustainability</u></p> <p>8.10 Total number of countries that have reached their HIPC decision points and number that have reached their HIPC completion points (cumulative)</p> <p>8.11 Debt relief committed under HIPC and MDRI Initiatives</p> <p>8.12 Debt service as a percentage of exports of goods and services</p>
<p>Target 8.E: In cooperation with pharmaceutical companies, provide access to affordable essential drugs in developing countries</p>	<p>8.13 Proportion of population with access to affordable essential drugs on a sustainable basis</p>
<p>Target 8.F: In cooperation with the private sector, make available the benefits of new technologies, especially information and communications</p>	<p>8.14 Telephone lines per 100 population</p> <p>8.15 Cellular subscribers per 100 population</p> <p>8.16 Internet users per 100 population</p>

Sourced: The official United Nations site for the MDG Indicators
<http://mdgs.un.org/unsd/mdg/Host.aspx?Content=Indicators/OfficialList.htm>
 Accessed 1 August 2009.

Appendix 2: Annual Reports of INGOs¹³⁶

Appendix 2 presents the key aims of six international non-government organisations (INGOs) and their overarching goals for 2006/07. The purpose is to highlight their approach to development and to issues of equality in their work. Unless otherwise indicated all the information is quoted verbatim from their respective annual reports for 2006/07, though some has been edited for the sake of brevity.

1. Action Aid International Annual Report 2007

Vision: What we want: A world without poverty and injustice in which every person enjoys the right to a life with dignity.

Mission: How we're going to achieve it: To work with poor and excluded people to eradicate poverty and injustice.

Values: ActionAid lives by the following values: Mutual Respect requiring us to recognise the innate worth of all people and the values of diversity.

- **Equity and Justice** requiring us to work to ensure equal opportunity to everyone, irrespective of race, age, gender, sexual orientation, HIV status, colour, class, ethnicity, disability, location and religion.
- **Honesty and Transparency** being accountable at all levels for the effectiveness of our actions and open in our judgments and communications with others.
- **Solidarity** with the poor, powerless and excluded will be the only bias in our commitment to the Fight against poverty.
- **Courage of Conviction**, requiring us to be creative and radical, bold and innovative - without fear of failure – in pursuit of making the greatest possible impact on the causes of poverty.
- **Independence** from any religious or party-political affiliation.
- **Humility** in our presentation and behaviour, recognising that we are part of a wider alliance against poverty.

Overview of our work in 2006:

- A year of improving our rights-based approach
- A year of strengthening our work on women's rights
- A year of becoming more international

2. Care USA Annual Report 2007: The Changing Times - A Plan for Change

‘What We Do

CARE tackles underlying causes of poverty so that people can become self-sufficient. Recognizing that women and children suffer disproportionately from poverty, CARE places special emphasis on working with women to create permanent social change.

¹³⁶ Reports sourced 10 July 2008

Women are at the heart of CARE's community-based efforts to improve basic education, prevent the spread of HIV, increase access to clean water and sanitation, expand economic opportunity and protect natural resources. CARE also delivers emergency aid to survivors of war and natural disasters, and helps people rebuild their lives.'

'CARE supported more than 1,000 poverty-Firefighting projects in 71 countries to reach more than 65 million people in fiscal year 2007 (FY07). CARE's education programs helped 7.5 million students gain the skills they need to succeed, and removed barriers to school attendance – especially for girls. CARE and our partners reached more than 40 million people with information and services to protect their health, plan their families and raise healthy children...More than 12 million people enjoyed improved access to safe water and sanitation, and learned about healthy behaviors (sic) to prevent illness...Our emergency preparedness and response projects reached more than 15 million people, with particular emphasis on the needs of the most vulnerable: children, women and the elderly.'

3. OXFAM GB Annual Report and Accounts 2006-07

'Our beliefs

We have five fundamental beliefs that underpin our work:

- All human lives are of equal value. Everyone has fundamental rights – these must be recognised and upheld at all times;
- Poverty makes people more vulnerable to conflict and natural disasters. Much of this suffering is unnecessary and must be relieved. We must work with others to respond with the most appropriate and effective solutions;
- People's vulnerability to poverty and suffering is increased by unequal power relations based on, for example, gender, race, class, caste, and disability. Women, who make up the majority of the world's poor people, are especially disadvantaged. Unequal power relations must be addressed wherever they occur;
- In a world rich in resources, poverty is a morally indefensible injustice, which must and can be overcome. Poverty, vulnerability and suffering are not pre-ordained events. All too often, poverty is the result of decisions taken, intentionally or unintentionally, by those in power. Unjust policies and practices, nationally and internationally, must be challenged and removed;
- With the right resources, support, and training, people living in poverty can solve their own problems. We all have a personal responsibility to work together to overcome poverty and suffering.'

Our approach

All our work comes from a rights-based approach. To overcome poverty and suffering we work to ensure that the rights of women and men are fulfilled and protected. Our programme is focused within five aims:

- Right to a sustainable livelihood
- Right to basic social services
- Right to life and security

- Right to be heard
- Right to equity: gender and diversity

We may focus on a specific aim, but we know that poverty is experienced through a range of issues and will not be eliminated by addressing just one of them. (p5)

4. Christian Aid Annual Report 2006/07: The Difference We Make

In 2006/07, we continued to implement our strategy for 2005-10, *Turning Hope into Action*, which sets out our goals across six priority areas, listed below.

- **Secure livelihoods:** helping poor and marginalised people protect and improve the quality of their lives and rebuild after emergencies
- **Economic justice:** challenging and changing the unjust systems that create poverty; and helping people claim their economic rights
- **Accountable governance:** working with communities across the world to hold those who control resources and wield power to account for their actions
- **HIV:** providing support and care for people living with the effects of HIV and challenging the stigma and discrimination associated with it
- **Strengthening the movement for global justice:** engaging and serving churches, supporters, volunteers and partners in the fight to eradicate poverty and injustice
- **Strengthening the organisation:** striving to make the best possible use of our human, financial and material resources; learning from our experience; and being open and accountable in all our actions.

5. World Vision International 2007 Annual Review: Hope for the most vulnerable

‘World Vision is both local and global, working at the grassroots in countries all around the world. World Vision is dedicated to working with children, families and communities, regardless of religion, race, ethnicity or gender, to overcome poverty and injustice.’ In 2007 it worked in 98 countries and states that it ‘served’ 100 million + people.

6. World Vision UK Annual Report 2007: Connecting People Fighting Poverty

World Vision UK has two main objectives: to ‘relieve poverty among the sick, the aged, the homeless and the needy’ in any part of the world; and ‘to educate people all over the world, and particularly in the UK, about the underlying causes of poverty’ (Memorandum of Association). Its activities include promoting an understanding of the issues that affect poor people and advocating effective solutions to the causes of their poverty.¹³⁷

¹³⁷ Despite the mission stating that WV UK works with the aged there are no references to this age group in the annual report. There are nearly 100 references to children/child; and just a few references to women/gender.

Appendix 3: UN documents reviewed for corpus analysis

Note: in each section documents are presented in chronological order, starting with the earliest year

Ageing issues

- A/RES/37/51 Question of Ageing General Assembly Dec 1982
- Annual UN General Assembly Resolutions on Ageing from 1983–2007
- A/RES/47/5 Proclamation Ageing General Assembly Oct 1992
- 50/141 International Year of Older Persons General Assembly Dec 1995
A/RES/50/141
- 1997/18 International Year of Older Persons: towards a society for all ages ECOSOC
July 1997
- Follow up to the Second World Assembly on Ageing A/58/160 July 2003
- UN Focal Points on Ageing – May 2007
- Commission on Social Development Focuses on Vulnerable Groups as it Considers
Shifting Demographics, Inter-generational Trends 45th session ECOSOC SOC/4726
12 February 2007
- First Review and appraisal of the Madrid International – ECOSOC E/CN.5/2008/7
Report of the Secretary General 46th session Feb 2008

Cross-cutting agency programmes (mostly major summits and conferences)

- Copenhagen World Summit on Social Development 1995 – UNDESA.
 - a. The Copenhagen Declaration
 - b. The ten commitments
 - c. The Programme of Action.
 - World Summit for Social Development, June 2000 and the twenty-fourth special
session of the General Assembly entitled ‘World Summit for Social Development and
beyond: achieving social development for all in a globalizing world’
 - 2000 Sept 8 General Assembly United Nations Millennium Declaration MDGs
 - May 2001 Brussels Declaration 4 and the Programme of Action for the Least
Developed Countries for the Decade 2001–2015 adopted by the Third United Nations
Conference on the Least Developed Countries, held in Brussels from 14 to 20 May
2001
 - Comprehensive Development Framework – World Bank 2004
 - March 2002 - International Conference on Financing for Development, Monterrey,
Mexico, from 18 to 22 March 2002.
 - Integrated and coordinated implementation of and follow-up to the outcomes of the
major United Nations conferences and summits in the economic and social fields
57/270 Resolution adopted by General Assembly January 2003 A/RES/57/270
 - 2005 Paris Declaration on Aid
-

- Commission for Social Development: 46th session 14th meeting ‘Consensus Text on Priority Theme *Promoting Full Employment and Decent Work for All*’ 22 Feb2008
Several references to older persons and MIPAA
- Aid Effectiveness Dakar 2008

United Nations

- UNDP Human Development Reports from 1990 – 2007
- International Labour Organisation – Annual Report 2007
- UN-Habitat
 - Papers from Human Settlement Conference 1996
 - 2003 Plan of Action
 - Annual Report 2007
- UNEP 2007
- UNFPA: International Conference on Population and Development ICPD 1994
 - Summary of the Programme of Action 1994. Related General Assembly
 - A/RES/50/124 – Implementation of the ICPD Programme of Action 20 December 1995
 - A/RES/51/176 - Implementation of the ICPD Programme of Action 19 December 1994
 - A/RES/49/128 – Report of the ICPD
 - A/CONF.171/13 – Conference Report of the ICPD
 - A/RES/52/188 – Population and development
 - Papers from Expert Group meetings 2002
- UNHCHR: Right to Development (R2D):
 - UN Declaration on Right to Development - Adopted by General Assembly resolution 41/128 of 4 December 1986 GA Res 41/128
 - The Realization of the Right to Development: Global Consultation on the Right to Development as a Human Right (HR/PUB/91/2), United Nations, New York, 1991, para. 150.
 - 1993: Vienna Declaration and Programme of Action- adopted by the World Conference on Human Rights 14 to 25 June 1993. A/CONF 157/24 Part 1 Chapter III A/RES/58/1851998 Establishment of Working Group to implement R2D
 - Commission resolution 1998/72 of 22 April 1998 on the urgent need to make further progress towards the realization of the right to development (see Official Records of the Economic and Social Council, 1998, Supplement No. 3 (E/1998/23), chap. II, sect. A.)
 - 1999 Interim Report of the High Commissioner for Human Rights. Report looks at training on human rights for implementation purposes (E/CN.4/1999/19), Points 8 – 10
 - 1999: A/58/257 58th meeting of General Assembly: statement re: 1999 HDR (p2) and its move from market orientation to people focus.
 - 2002 Third Session of Working Group
 - Commission on Human Rights resolution 2002/69 UNHCHR 56th meeting April 2002
 - Commission on Human Rights resolution 2003/83 UNHCHR 63rd meeting April 2003

- 2005 Right to Development and Practical Strategies for implementation of MDGs
- Useful summary of purpose of MDGs and their links with R2D –
- Preliminary concept note taken from UN Economic and Social Council
E/CN.4/2005/WG.18/TF/2 20 September 2005 COMMISSION ON HUMAN RIGHTS Sixty-second session Working Group on the Right to Development High-level task force on implementation of the right to development Second session re Goal 8 MDGs
- 2005 High-level task force on the implementation of the right to development within the framework of the Working Group set up to assist the Working Group to fulfil its mandate. E/CN.4/2005/25
- 2005 14-18 Feb Report of 6th session of WG E/CN.4/2005/25 High Commissioner for Human Rights
- World Bank: World Development Reports from 1983 – 2007
- World Food Programme
- WHO: The world health report 2007 - A safer future: global public health security in the 21st century

Appendix 4: Word Frequency Tables:

Table 1 World Development Reports – word frequency

No of pages	1982	1983	1990	1991	1994	1999	2000	2002	2003	2007/8
	186p	228p	274p	304p	270p	312p	335p	264p	276p	336p
Older* Persons										
aged	0	0	13	4	1	0	1	0	0	0
ag(e)ing	0	0	3	6	4	9	0	0	2	11
elderly	2	0	13	1	1	1	29	0	3	10
grdparents	0	0	0	0	0	0	0	0	0	0
old (age)	1	0	8	1	0	0	26	0	2	3
older	2	0	0	0	0	0	2	0	0	14
pension/s	0	2	5	2	13	13	23	0	1	0
	5	2	42	14	19	23	81	0	8	38
Women										
female	8	9	34	29	7	5	171	2	8	110
gender	0	0	4	9	5	20	129	4	5	142
maternal/ity	1	0	21	13	7	7	11	0	1	57
mother/s	0	0	18	5	2	0	8	1	0	103
woman/en	20	8	121	58	52	15	276	5	48	429
	29	17	198	114	73	47	595	12	62	841
Children										
boys	0	1	5	4	0	1	13	4	12	92
child/ren	23	10	165	64	13	56	210	8	29	538
girls	1	1	15	7	3	3	45	0	21	251
grdchildren	0	0	0	0	0	0	2	0	0	1
infant	10	9	27	87	6	24	31	4	12	13
intergen'al	0	0	0	1	0	3	1	0	1	11
primary education	4	1	22	15	1	3	13	3	5	49
young	2	2	10	0	1	2	13	3	5	1780
	40	24	244	178	24	91	328	22	85	2735

* Legend

Aged: as in 'the aged' e.g. 'the needy aged, the ill and the disabled' WDR 1990:274

Ag(e)ing: in contexts that appear to include older people e.g. 'age and gender'

Old: as descriptor of older people only e.g. 'old fishermen'.

Table 2 Human Development Reports – word frequency

	1982	1983	1990	1991	1994	1999	2000	2002	2003	2007/ 08
No of pages	n/a	n/a	189p	202p	226p	172p	309p	292p	368p	399p
Older* Persons										
age/d			1	1	4	0	4	5	6	8
ag(e)ing			0	0	0	0	0	0	0	0
elderly			1	4	0	9	0	3	4	7
grdparents			0	0	0	0	0	0	0	0
old age			1	3	0	2	1	0	0	3
older			0	0	0	0	0	0	0	4
pension/s			1	3	1	0	0	1	1	1
			4	11	5	11	5	9	11	23
Women										
female			51	83	12	33	163	212	224	151
gender			6	36	33	71	129	170	164	61
maternal/ity			4	4	4	4	11	18	75	26
mother/s			9	6	0	2	8	1	2	0
woman/en			31	91	65	146	268	212	229	188
			101	220	104	256	579	613	694	426
Children										
boys			9	5	2	2	9	5	23	3
child/ren			84	150	78	73	216	124	288	200
girls			11	8	4	8	30	9	61	12
grdchildren			0	0	0	0	2	0	0	6
infant			7	22	15	4	22	21	36	15
intergen'al			0	0	4	0	0	0	1	1
primary education			19	21	8	4	19	24	53	7
young			6	10	5	8	5	5	12	10
			136	216	116	99	303	188	474	254

*** Legend**

Aged: as in 'the aged' e.g. 'the needy aged, the ill and the disabled' WDR 1990:274

Ag(e)ing: in contexts that appear to include older people e.g. 'age and gender'

Old: as descriptor of older people only e.g. 'old fishermen'.

Table 3 Right to Development Working Group - word frequency

No. of pages	1982	1983	1990	1991	1994	1999	2000	2002	2003	2007
	n/a	n/a	n/a	n/a	29p	31p	24p	46p	21p	20p
Older* Persons										
aged					0	0	0	0	0	0
ag(e)ing					0	0	0	1	0	0
elderly					1	0	0	0	0	0
grdparents					0	0	0	0	0	0
old age					0	0	0	0	0	0
older					0	0	0	0	0	0
pension/s					0	0	0	0	0	0
					1	0	0	1	0	0
Women										
female					0	1	8	0	0	0
gender					0	0	10	5	3	3
maternal/ity					0	1	1	0	0	0
mother/s					0	0	0	1	0	0
woman/en					12	2	2	9	7	2
					12	4	21	15	10	5
Children										
boys					0	0	0	2	0	0
child/ren					6	5	4	1	2	1
girls					0	0	2	2	0	0
grdchildren					0	0	0	0	0	0
infant					0	1	0	0	0	0
intergen'al					0	0	0	0	0	0
primary education					0	14	4	1	0	0
young					0	1	0	2	1	0
					6	21	10	8	3	1

***Legend as for Tables 1 & 2**

Source: http://ap.ohchr.org/documents/dpage_e.aspx?s=103

1994: E/CN.4/1995/27 Report of the WG on the Right to Development on its third session

1999: E/CN.4/1999/WG.18/2 Report of WG Independent Expert

2000: E/CN.4/2000/21 Proceedings of Working Group on Right to Development

2002: E/CN.4/2002/28/Rev.1 Open-ended Working Group on Right to Development 3rd Session

2003: E/CN.4/2003/26 Open-ended Working Group on Right to Development 4th Session

2007: A/HRC/4/47 Open-ended Working Group on Right to Development 8th Session

Appendix 5: WBCSSP Survey



Survey for West Bengal Civil Society Support Programme

My name is Valerie Lipman. I am carrying out research for my doctoral thesis about the engagement of old people in international development. I am based at the University of Southampton, UK, and am doing my field research in Kolkata. As part of my research I am keen to capture the views and experiences of those who are working at the grassroots with their communities. I would be very grateful if you would fill in this survey and return it to me by email or post. There are no right or wrong answers, I am simply trying to find out how an internationally funded civil society works with old people. All of the information you give will be treated confidentially and reported anonymously. If you would prefer not to give me your contact details please omit your own name and address, and just give the name of the organisation. If it is easier for you to attach other information than fill out the form I would be very happy to receive that instead. *Dhanyabad.*

A) About You

Your Name	
Job Title	
Name and address of your organisation	
Tel No / Email	

Are you happy for to be contacted for interview? Yes No

Your Age _____ Your Gender Female Male

B) About Your Project

1. What are the overall aims of your organisation?

2. What is the title and aims of your project for WBCSSP?

3. Who is the target audience of your CSSP project and what geographical area does it seek to cover?

4. Why have you chosen this particular project theme and group of people?

5. What do you hope your WBCSSP project will achieve?

6. Which areas do you think will be the easiest to achieve

7. Which areas do you think will be the hardest to achieve and why?

8. How did the WBCSSP project come about? Which sections of the community were involved in developing it?

9. Have there been any external influences in creating your project e.g. District Council, Panchayat, Gram Sabha etc?

10. How many people have you already reached? What is the make-up of them e.g. gender, race, age

11. What difference has the project made to the community and to lives of individuals?

D. Old People (approx 60 plus years)

12. Do you know what is happening to old people in this community e.g. how many, how many live alone, are working, have mobility difficulties

Yes No Don't really know

13 Do you feel old people are contributing to the community?

Yes No Don't really know

If yes, please give examples, e.g. as volunteers, paid workers in the project, mentors, carers

14 Do you think old people are receiving sufficient support in the community?

Yes No Don't really know

If yes, please give examples of support e.g. children, other relatives, pension

15. Do you know if older people are benefiting from your project

Yes No Don't know

If yes, how are they benefiting?

16 Do you have any old people employed in your WBCSSP project?

As volunteers: Yes No Don't know

As paid staff: Yes No Don't know

17. If old people are not included in the programme or are not benefiting what would encourage and/or enable your WBCSSP to be inclusive of older people?

18. Is there anything else you would like to tell us, which hasn't been covered here.

Many thanks for the time and thoughts you have given in completing this questionnaire. Please return it within the next 2 weeks to my email address below or send it to the following address: Valerie Lipman c/o PRIA, GC -126. Sector – III, Salt Lake City, Kolkata – 700 106, West Bengal or email valerielipman2003@yahoo.co.uk (VL 24 March 2009)

Appendix 6: Project information sheet



PROJECT INFORMATION SHEET

The representation of older people in the discourse and policy of international development:

How do older people benefit from international development?

The aim of this research is to see how older people (60 plus years) are represented in the written policies and documents concerned with international development, and how this in turn influences what happens to older people on the ground in terms of development projects.

Ms Valerie Lipman, from the Centre for Research on Ageing at the University of Southampton, is undertaking this research for her doctoral degree. She has been awarded research funding by the UK Economic and Social Research Council for the period 2008 – 2010. Valerie has a long background in working with older people, has experience of working in international development (formerly with Oxfam) and has travelled to India many times.

An earlier study she carried out for her MA thesis showed that students doing UK post-graduate Development Studies courses did not receive any information about the needs and potentials of older people. This means that those graduates who later become practitioners, policymakers or academics in international development are likely to be unaware of and possibly insensitive to the interests of older people. Valerie's doctoral research will be looking to see what actually happens in practice.

What will the project involve doing?

The study will take place in West Bengal and will take place between February and April 2009. Overall it will involve finding out what type of support is available for older people in the area, and exploring how the programming of international development agencies takes on board how older people are involved, included or affected by their programmes. Valerie will be seeking to hold in-depth interviews with key Figures in a number of agencies to build up a picture of what influences their choice of work priorities and how they identify the client groups with whom they work. The study will be a two stage process.

Stage one will involve talking with a senior manager in the offices of three development/funding agencies: an international UN organisation, a regionally based international non-government organisation and an Indian national organisation working in the area, to identify how their literature, policies and programmes actively take on board the interests of older people. Each of these three agencies will then be asked to identify one or two of their grassroots community development projects for the next stage interview. This Stage two interview will be held between the appropriate person and Valerie on site at the development project. The aim will be to explore

the extent to which older people's specific needs are taken into account; and what the intended and unintended impacts of the projects on the wellbeing of older people are in that community.

What will happen to the research?

The main purpose of the research is to develop new ways for ensuring that the interests and concerns of older people are recognised and acted upon by people working in international development, whether are planners, policy-makers or practitioners. It is intended that the findings of the research will be disseminated in a variety of ways, from published articles in journals and newsletters concerned with international development, to running workshops and giving conference presentations.

Valerie can be contacted at the University of Southampton on her email address: val1v07@soton.ac.uk or on her mobile phone in India: 988 356 0850. If you have any questions about any of the above please feel free to contact her at any time.

If you have any comments or concerns about this study please contact:

Professor Maria Evandrou
The Centre for Research on Ageing
School of Social Sciences
University of Southampton
Southampton SO17 1BJ
Tel: ++ 44 (0) 23 80 592578
Email: maria.evandrou@soton.ac.uk

or

Dr Martina Prude
Research Governance
Corporate Services
Building 37, Level 4, Room 4001
University of Southampton, Highfield Campus
Southampton, SO17 1BJ
Tel: ++44 (0) 23 8059 (2)5058
Email: rgoinfo@soton.ac.uk

With many thanks for your interest in this project.

Valerie Lipman
10 February 2009

Appendix 7: Interview and meetings schedule February - April 2009

Name	Organisation	Position/role	Date of interview
Dr Saswati Ghosh	Institute of Development Studies Kolkata (IDSK)	Lecturer Health Economics	6 th February
Dr Anuradha Sen	HelpAge India - Kolkata	Deputy Director, Eastern Region	9 Feb 17 Feb (site visit)
Saradindu Banerjee	Participation Research in Asia (PRIA)	Programme Manager, Kolkata	12 Feb 23 March
Rajagopal Chakraborti	Dept South & SE Asian Studies, University of Kolkata	Professor, Economics & Demography	18 Feb
Name protected	Action Aid India - Kolkata	Programmes	23 Feb
Dr Indrani Chakravarty	Calcutta Metropolitan Institute of Gerontology (CMIG)	Director	24 Feb 5 March (observation)
Name protected	DFID	Kolkata office	2 March
Name protected	The Calcutta Samaritans	Programme Coordinator	2 March
Mathew Cherian	HelpAge India	Chief Executive	9 March
Jagat Pattanaik	ActionAid India	Director - Programmes	9 March
Arundhuti Roy Choudhury	DFID	Social Development Advisor	10 March
Harsh Jaitli	PRIA	Director	12 March
Dr KRG Nair	Centre for Policy Research, New Delhi	Honorary Research Professor	12 March
Meenakshi Kathel	UNDP	Gender Advisor	13 March
Name protected	Government of West Bengal	Programme Advisor, Planning & Development	26 March
Tarum Kumar	Self Help Groups Promotional Forum (SHGPF)	Chief Secretary	27 March
Name protected	Government of West Bengal	Dept of Social Welfare	30 March
Dr M.N.Roy	Government of West Bengal	Principal Secretary Panchayats & Rural Development Dept	1 April
Dr Ashok Sircar	Advisor to DFID on WBCSSP	Independent Consultant	5 April

Appendix 8: India - Interview Topic Guides

I Government and professional bodies

Overarching Research Project Questions

1. How have the dominant development theories of international development been deployed locally over the last 10 years?
2. How do the organisations talk about and deploy any or all of: participation, basic needs, inclusion, rights-based approach or human rights, in their work and evaluate their work against these?
3. How are needs of marginalised groups addressed and are they targeted e.g. are women or issues relating to gender receiving particular attention?
4. What are the theoretical premises which govern and drive the organisation/project?
5. What, if any, evidence is there that international communications/guidance/resolutions affect what organisations do?

Introduction: explain who I am, purpose of research, provide further copy of Project Outline, discuss and agree consent form.

A. About your organisation – aims, coverage (aim is to get at the organisation's approach)

1. What are the overall objectives of the organisation (supplementary – what is the mission statement)?
2. Who are the organisation's target groups?
3. What geographical area does the organisation cover?
4. What are the internal/national and external/international influences on your organisation in terms of programming e.g. MDGs, aid effectiveness guidance?
5. How are projects assessed by the organisation?
6. What does success look like to your organisation?

B. About your Programme (aim is to get at practical action on the ground)

7. What do you hope:
 - a) individuals gain from the programme?
 - b) the community gains from the programme?

- Who was involved in the development of the programme?
- Is it part of a larger national or regional programme/set of objectives?
- Which other bodies do you feel have directly or indirectly influenced your selection of priorities e.g. district council/regional office/national office?
- How many people are affected by the organisation?
 - a) Intended groups: how many, in what way, what difference has it made to their lives?
 - b) Unintended: how many, in what way difference it has made to their lives
- How are you measuring the gains to the individuals, to the community as a whole?

C. Your organisation, development and ageing?

8. What impact do you think globalisation/modernisation/economic growth has had on older people, on the care and support structures? e.g. families staying together
9. Do you think attitudes are changing towards old people? How is the intergenerational contract being affected?
10. Your view of how older people are treated in India/West Bengal
11. So far my research has shown that none of the key documents, policies or programmes such as the MDGs, evaluation schema, aid accountability criteria, address old people. Why do you think this is the case?
12. What could be done about it?
13. As a development organisation how much are you aware of Ageing Summits and the MIPAA?
14. How do you feel older people benefit from your organisation?
15. Do you know what is happening to older people as a consequence of your projects?
 - If yes:* how are you gathering (e.g. systematically, accidentally, anecdotal, and using the information?
 - If no:* why don't you know
16. How do you think older people could have contributed to the organisation and its projects?

- 17 What would encourage and/or enable the organisation to be inclusive of older people?

D Other

- 18 Is there anything that you would have done or would like to do in the future that would enhance this project or any others?
- 19 Is there anything you would like me to have asked you, or anything you would like to tell me about:
- a) this project
 - b) its parent organisation?
20. Practicalities of visiting the projects – how to make contact, with whom etc

E Final remarks

- a. Thank them for their time
- b. Remind interviewees they can contact me further
- c. Is it okay if I follow up with them, if necessary and how best to contact them
- d. May I take some materials with me e.g. annual report, copies of any promotional materials for project, procedures and policies e.g. monitoring and evaluation

** Note what they call the 'users' of their services/organisation e.g. partners, beneficiaries, clients etc*

Valerie Lipman
6th February 2009

(Appendix 8 contd - India: interview topic guide)

II DFID (Kolkata), NGOs and CBOs

VL's Overarching Research Project Questions

- 1 How have the dominant development theories of international development been deployed locally over the last 10 years? (e.g. participation, empowerment, RBA)
- 2 How do the organisations talk about and deploy any or all of: participation, basic needs, inclusion, RBA or human rights, in their work and evaluate their work against these?
- 3 How are marginalised groups dealt with e.g. are women or gender issues given particular attention?
- 4 What are the theoretical premises which govern and drive the organisation/project?
- 5 What, if any, is there evidence that international communiqués/guidance/resolutions affect what organisations do?

Introduction: explain who I am, purpose of research, provide further copy of Project Outline, discuss and agree consent form.

Section on interviewee – how long you been involved, your interest in development, any driving interests etc. Tell me about development generally/what it means to you?

A: About your project – aims, coverage

- 1 What are the overall objectives of the organisation (supplementary – what is the mission statement)?
- 2 What is the aim of this project?
- 3 Can you tell me how you define ‘community’ in terms of the work that you/your organisation does?
- 4 Who is the target group for this project; and why that/those particular group/s?
- 5 What geographical area does it cover?
- 6 What do you hope:
 - a) individuals will gain from the project
 - b) the community will gain from the project?
- 7 What does success look like to you?

B How did the project come about?

- 8 Who did you involve in the development of the project?
- 9 Is it part of a larger national or regional programme/set of objectives?
10. Which other bodies do you feel have directly or indirectly influenced your selection of priorities e.g. district council/regional office/national office?

C Results

- 11 How many people affected by the project:
 a) Intended group: how many, in what way, what difference has it made to their lives?
 b) Unintended: how many, in what way difference it has made to their lives
- 12 How are you measuring the gains to the individuals, to the community as a whole?

D Perspective on older people (define “older/old”)

- 13 How do you feel older people have benefited from your project?
- 14 How are older people supported in the community
- 15 Do you know what is happening to older people as a consequence of your project?
If yes: how are you gathering (e.g. systematically, accidentally, anecdotal, and using the information?
If no: why don't you know
- 16 How do you think older people could have contributed to the organisation and its projects?
- 17 What would encourage and/or enable the organisation to be inclusive of older people?

E Other

- 18 Is there anything that you would have done differently, or would like to do in the future that would enhance this project or any others?

F Final remarks

- Thank them for their time
- Remind interviewees they can contact me further
- Is it okay if I follow up with them, if necessary and how best to contact them
- May I take some materials with me e.g. annual report, copies of any promotional materials for project, procedures and policies e.g. monitoring and evaluation

Note: what to do they call the “users” of their services/organisation e.g. partners, beneficiaries, clients etc

Valerie Lipman - 7th February 2009

Appendix 9: Consent Form



Consent Form

The representation of older people in the discourse and policy of international development

I have read and understood the information sheet about the project. I have been given the opportunity to ask any additional questions about the research project and what I would be expected to do and these questions have been answered by the researcher.

I understand that my participation in this study is entirely voluntary, and that I can withdraw from the study or stop the interview at any time, and that I do not need to give any reasons or explanations for doing so. I understand I will not be penalized in any way for withdrawing from this study.

I understand that in any reference to my interview made in research presentations, reports and articles and so on, personal, organizational and place names will be changed (anonymised) so that I, and any other individuals mentioned, cannot be identified. What I say will also not be shared with other members of my family or with my friends or colleagues.

As required under the Data Protection Act (1998) we will not pass on your details to anyone else and information from the interviews will be held securely.

I agree to participate in an interview about development practice in my organisation and how this relates to the interests of vulnerable groups.

Yes No Please initial

I agree to being contacted again during the project for clarification of points raised in the interview.

Yes No Please initial

I agree to the interview being audio-recorded and transcribed for research purposes.

Yes No Please initial

I agree to the possibility of the transcription of my interview being archived and made available for use by other bona fide researchers. If the transcript of my interview is selected for the archive, the transcript will be totally anonymised so that nothing in it, such as organization, place or individual names can be identified. I assign the copyright for my contribution to the Faculty for use in education, research and publication.

Yes No Please initial

I understand that I will be sent a report on the project findings at the end of the project if I wish.

Yes, I do want a copy of the project report

No, I would rather not have a copy

I, _____, have read and understood the above information and agree to participate in this research project on '*The representation of older people in the discourse and policy of international development*' that is being conducted by Valerie Lipman at the University of Southampton.

Signature _____ Date _____
interviewee

Signature _____ Date _____
interviewer

If you have any comments or concerns about this study please contact:

Professor Maria Evandrou
The Centre for Research on Ageing
School of Social Sciences
University of Southampton
Southampton SO17 1BJ
United Kingdom

Tel: ++44 (0) 23 80 592578
Email: maria.evandrou@soton.ac.uk

Appendix 10: Documents reviewed for India case study

The following list is broken down by agency

1. Action Aid India

- *Year Planner – 2009*
- *Kolkata Regional Officer – Annual Report 2007*
- *Shadow Report on Government of India's II, III, IV, & V Combined Report on ICESCR. A Coalition Report of 152 NGOs in India in Partnership with ActionAid 2008*
- www.actionaid.org/india/

2. Calcutta Metropolitan Institute of Ageing

- *Help the Aged Help Themselves - Annual Report 2007 – 08*
- *Ageing & Society: The Indian Journal of Gerontology Jan-March 2008 and April-June 2008*
- www.cmig.in/

3. DFID

- *Three Faces of India DFID Country Plan 2008-2015*
- *Evaluation of DFID Country Programmes Country Study: West Bengal Final Report 2007*
- WBCSSP documents – preparatory papers
- www.dfid.gov.uk/

4. Government of India & Government of West Bengal

- *National Policy on Older Persons*
- National Rural Health Commission
- West Bengal NRHM Programme Implementation Plan (PIP)
- Indian Census data
- <http://india.gov.in/govt.php>
- www.wbgov.com/ (older people appear in the Department for Women and Child Development & Public Welfare; and in section headed 'Citizen')

5. HelpAge India

- HAI Annual Report 2007 – 2008
- Research and Development Journal Jan 2009
- *Age Helps* CD 2009
- *Equal Rights for Elders* PACS Programme leaflet
- Draft Action Plan for Better Implementation of National Policy on Older Persons
- www.helpageindia.org/

6. PRIA

- *Citizenship and Governance: Challenges for Social Exclusion* 19-20 February 2009. Jointly organised by Department of Adult, Continuing Education, Extension & Field Research and PRIA
- Annual Report 2007-2008
- Annual Report At a Glance 2007-08
- WBCSSP - Promotional leaflet
- WBCSSP – Procedures for Grant Application
- Accessing Information under RTI – Citizens’ Experiences in Ten Suites – 2008
- Legal Framework for Citizen Participation in Local Governments in South Asian Region (2004)
- www.pria.org/

7. UNDP - India

- Country Programme for India 2008-2012 (July 2007)
- UNDP in India (July 2007)
- Evaluation of the National Human Development Report System. Case Study: India (2007) Prof Carl Riskin & Dr Narasimha Saxena (pp32)
- Strengthening State Plans for Human Development
- State Human Development Report (West Bengal) 2005
- www.undp.org.in/

8. CSOs/CBOs

- Suprava 14th Annual Report 2007–08
- Self Help Group Promotional Forum A Platform for SHGs in West Bengal – promotional leaflet (undated) wbshgpf@yahoo.co.in
- SHGPF Concept note for Project Grant to HelpAge Inc

9. Other

- Infochange (2006). Poorest Areas Civil Society Programme 2001 - 2008 PACS Impact. New Delhi: 72.

Appendix 11: Summary of findings from questionnaire respondents

Project code	Target groups	Main purpose of WBCSSP project	Prior knowledge of OP in the community	Known Impact of CSSP on OP
1	'Marginalised women'	'Empower women's groups'; 'make women aware of their rights'.	<i>Role:</i> 'Old women always share their experience with the community: that helps the people to work better'. <i>Services:</i> 'insufficient support being given. 'Rural area is better than urban'	Impact reported but not qualified or quantified
2	'Marginalised women i.e. SC, ST & Muslim'	'Strengthen ...citizen's collectives; empowerment of women'	<i>Role:</i> OPs contributing to community as members of NGOs and CBOs, <i>Services:</i> Insufficient support for OP in community	OP 'getting information about facilities of old age people'
3	Muslim minority, SC, ST, women, children, displaced family, BPL, disabled	Empowerment to access govt schemes for work, food, health, education etc	<i>Role:</i> 'Contribute to social governance'; 'small children like to play with them, decreases social quarrel'; making social prayer place <i>Services:</i> Get old age pension	Yes – not qualified or quantified. They are aware the community should not neglect OP – OP need a safe place to be because of physical ageing. KAGUS is requesting NREGA for OP
4	Women, SC, ST, Muslim, SHGs, CBOS,	Deepening participation inclusion of marginalised in local governance.	None reported	280 old people now claiming pensions
5.	'Inmates and Staff of Correctional Homes, including the elderly'	Rights based jail code; sensitise staff on prisoner rights, 'specially of female, child, elderly and ill-prisoners'	<i>Role:</i> Source of Advice and mental support to other prisoners <i>Services:</i> 'Young prisoners take good care of elderly prisoners	Not known yet – project will identify how many 60 years + prisoners

Project code	Target groups	Main purpose of WBCSSP project	Prior knowledge of OP in the community	Known Impact of CSSP on OP
6 **	Poor & marginalised: women, BP, SCs, STs, Minorities, refugees, landless & migrant labourers etc	Promoting, strengthening and CBOs and Self Help Promoting Institutions	'Don't know'	Project will 'promote awareness on various schemes and policies of the Government for the poor like the Old Age Pension ...'
7 **	'Vulnerable groups, such as minorities, ST, SC, women, the disabled and migrant workers'	Improve health status of rural poor by creating institutional arrangements to mobilise for access to health facilities; increase CBO and citizen participation in developing health policy	None	None
8 **	Women and child labourers	Improve rights and access to government health and nutrition schemes	<i>Role:</i> Help with their experience and knowledge; look after younger children in the family and supervise their education; help with decision making <i>Services:</i> Insufficient community support	OP will benefit through old age pension scheme and beedi workers welfare fund, if they are beedi workers.
9 **	All groups	Promote and support 'pro-poor self-help' groups in the 8 districts of the WBCCSP	Yes – not specified	None
10 **	Disability	To mainstream disability in all developmental activities – government, NGOs, CBOs	Yes – not specified	'Too soon to tell'

Project code	Target groups	Main purpose of WBCSSP project	Prior knowledge of OP in the community	Known Impact of CSSP on OP
11.	Child and women labour; children 0 – 6 yrs	Increase family income by extending range of jobs; improve family nutrition	<i>Role:</i> most of the OPs were involved in local govt cttcs and CBOs; ‘they instruct and suggest to youth through discussion’ <i>Services:</i> Existing CBOs provide physical and mental support as well as getting pensions. A local mothers group looks after health matters of OP	Some older persons getting pension and food from ration shops through the project’s intervention
12. **	Mostly Muslim	Community empowerment – to raise voice, combat injustice, access rights	<i>Role:</i> OP volunteer in social activities, promote adult education; ‘care and affection to their 3 rd generations’ <i>Services:</i> OP neglected and deprived of their own rights and needs ... ‘Not getting due care and nutrition due to penury, despite having good intention of their children’	Though project not designed for OP, OP are getting in touch and then going to claim their rights. Project has provided direct help to some OP to make claims
13.	‘Distressed communities’ BPL families, Small & marginal farmers	Reduce migration, establish food security, stop trafficking, enhance women’s voice	<i>Role:</i> OP sharing experience and knowledge in village level planning <i>Services:</i> Engaged in religious activities	Indirectly benefiting through enhanced family income; will be surveying hungry people, especially old age
14.	Landless labourers and agricultural labourers	Support mother and children – providing food, reducing migrating labours	<i>Role:</i> Try to solve local level small problems <i>Services:</i> Not sufficient	No

Legend: ** = Attended workshop; BPL = Below Poverty Line; NREGA = National Rural Employment Guarantee Act; PRI = Panchayat Raj Institutions

Appendix 12: Report of WBCSSP workshop

***Justice for All:
Including for older people***

Report of a PRIA/WBCSSP workshop

7 April 2009

held at Calcutta Samaritans, Kolkata

**Valerie Lipman BA, MBA
Centre for Research on Ageing
University of Southampton
valerielipman2003@yahoo.co.uk**

Contents of Report

1. Background
2. Workshop event
3. WBCSSP engagement with older people
 - 3.1. Direct work with older people
 - 3.2. Indirect work with older people
 - 3.3 Knowledge of older people's concerns and issues
4. Summary of discussion and issues raised
5. Reflection and conclusion

Appendix 1: List of participants

Appendix 2: Survey form to WBCSSP grantees

Appendix 3: Briefings for WBCSSP workshop

A Briefing & Resources: Global Ageing

*B Overview of Government Structure, Policies and Entitlements
relating to older people in West Bengal*

Acknowledgements

I am deeply grateful to the staff of PRIA in Kolkata for their warm welcome and very generous support with my research. My thanks go also to the representatives of WBCSSP projects who attended the workshop on the 7th April and gave freely of their time, thoughts and suggestions; and to the Calcutta Samaritans for providing such a delicious lunch for everyone. I am indebted to you all.

1. Background

1.1. The West Bengal Civil Society Support Programme (WBCSSP¹³⁸), managed by PRIA, is an initiative of DFID (Department for International Development, UK) and the Government of West Bengal. Its objective is to enhance the role of civil society in achieving pro-poor development in West Bengal. PRIA (Participation Research in Asia), based in New Delhi with a branch office in Kolkata, is an *International Centre for Learning and Promotion of Participation and Democratic Governance*¹³⁹. The detailed design of the WBCSSP programme was prepared in 2003 by a committee comprising civil society organisations, government and international experts, and was finalised after a series of discussions with various stakeholders.¹⁴⁰ The programme was launched in August 2007 and is due to run for five years.

1.2. Grants have been provided to 61 partner organisations working in the eight target districts designated by the programme. The partners are provided with financial and programme monitoring support, and training and workshops on themed subjects concerned with their particular target groups and areas of work. As well as supporting individual projects the programme also conducts state level activities to encourage policy level advocacy.

1.3. In early February 2009 Valerie Lipman, a PhD research student from the Centre for Ageing at the University of Southampton in the UK, approached PRIA to find out how the WBCSSP engaged with the interests of older people. Ms Lipman's doctoral thesis is about the engagement of old people in international development and as part of her research, which is based in Kolkata, she was seeking to capture the views and experiences of those who work at the grassroots with their communities. As an earlier part of this research she had also sent out a survey to all WBCSSP grantees to gain information about how or whether older people were considered to be part of the programme (see Appendix 2 – a separate report on the survey results is to be produced). Following a first meeting with the Director, Saradindu Banerjee and his team Ms Lipman offered to run a half day workshop/consultation with the grantees of the PRIA programme in West Bengal to explore their role with and knowledge of older people. For logistical and resource reasons only grantees based in Kolkata were invited.

2. The Workshop

2.1. The participants

The consultation workshop was held on 7th April 2009 at The Calcutta Samaritans, 48 Ripon Street, Kolkata. 24 people were present, representing 16 organisations and four

¹³⁸ Website: www.WestBengalcivilsociety.org

¹³⁹ PRIA's strapline, found on all their publications

¹⁴⁰ From WBCSSP Procedures for Grant Application information leaflet

staff from PRIA. Four of the organisations had sent two people. All the organisations were Kolkata based – some worked nationally, others worked only in West Bengal, while a few were specifically local to the eight designated areas under the WBCSSP. The age range appeared from mid twenties to early sixties. The majority of participants were male, there were six female participants. English was the medium used mostly, but with some Bangla (translated by PRIA staff to enable the researcher’s understanding).

2.2. Format of meeting

Mr Banerjee introduced the event, highlighting that PRIA was interested in pursuing this subject as one they had not previously looked at. Valerie Lipman (VL) outlined the session’s three-fold purpose:

- Sensitisation about older people
- Consultation exercise for her research
- Opportunity for information exchange and discussion on issues relating to working with old people.

VL referred people to the three papers she had just circulated to participants: a project briefing outlining her research; a summary of global ageing issues; summary of resources available for old people in West Bengal.

Participants were asked to introduce themselves: giving their name, organisation, and project; and to answer two questions:

- Are they doing anything for old people?
- Do they know what is happening to old people in their communities?

Section three below details the responses and the range of work and contact with older people. A discussion session followed the introductions – issues from this are highlighted in section four below.

3. Working with older people

Overview

From the introductions it was possible to identify those activities which were directly concerned and planned with old people in mind, and those activities from which older people benefited indirectly e.g. where the old people were benefiting because of others in the household gaining government entitlements.

Of the 16 organisations at the meeting:

- 4 said they were directly engaging in activity for old people
- 7 said they were indirectly doing something for old people
- 12 acknowledged some information about old people
- 4 organisations categorically reported that they were not doing anything with old people

- 2 organisations stated that they had no knowledge or were unaware of what was happening to older people in their respective programmes

3.1. Direct work with older people

Workshop participants cited the following activities:

- Supporting and advocating for older hand rickshaw pullers
- Advocating for food security for older people
- Providing free legal aid
- Health support to older people who are not getting the proper benefits assigned to them by the government
- Focusing on the blindness problem of the old age people and providing specialist eye camps in remote rural areas to carry out cataract procedures. *‘Without the operation it leads to blindness and becomes the burden of the family’.*
- Arranging speed boat transport for older cataract patients.
- Granny adoption programme

3.2. Indirect work with or of benefit to old people

- Strengthening self-help forums
- Through work with biri-makers¹⁴¹
- Helping families get BPL (below poverty line) cards
- Providing protection for older people under the Lok Ayukta¹⁴²
- Provision of mobile food dispensary
- Drawing on expertise of rural older people in setting up adult education centres and learning
- Engaging older people in campaigning
- Providing capacity building programmes in 16 other states of India *‘which highly involves people from all ages’.*

3.3. Knowledge and views about the circumstances of older people

The following were cited by participants:

- Older people play a key role in the decision making in the family
- They provide help for health awareness especially in cases of maternity
- Older people are really good at social and community mobilization
- *‘In the rural area the picture is not very good’*
- Food insecurity is one of the major setbacks faced by the NGO’s working with CBO’s for older people.
- Older hand rickshaw pullers are homeless and live by begging
- *‘We operate [on cataract patients] so that we can get to fragile people and reduce suffering and them becoming a burden’*
- The Maintenance and Welfare of Parents and Senior Citizens Act 2007

¹⁴¹ Biris, also spelled bidi or beedi, are hand-rolled cigarettes. Biri-making is often a cottage industry.

¹⁴² Lok Ayukta is the legal framework which seeks to ensure transparency and accountability in public administration and allows for investigation into complaints by citizens against public functionaries.

- Travelling in areas of West Bengal is very difficult especially for old people.

'They are suffering from social insecurity and food insecurity'

'In our society the position of [an] ageing person is not very good'

4. Observations from discussion

The overarching issues of concern that emerged about older people were in relation to poverty and health. The absence of a pension that is sufficient to live on, the difficulties of claiming any benefits that are available and the high costs of health care make it extremely difficult for poor families to sustain their elder relatives. Medicines are expensive; doctors do not make home visits, and it is very costly and time consuming to make trip to a doctor or health centre. There is no specialised care for older people. If people go on working in strenuous jobs, such as the rickshaw pullers, until very late years their health is even worse. If they leave to do something less strenuous they will need to be re-trained but they may be too old to learn new skills and in any event there are no resources to provide the training for older persons. These features highlight the social and economic framework which any assessment of work with older people in West Bengal would need to take into consideration. Against that two other key themes emerged which provide a broader context for understanding and engaging with older people. These are described below.

4.1. Attitudes to older people

Views about older people were mixed. Older people were seen as being very useful to the community, through their role as mentors for young women, helping to look after children, or seeking their experience for developing new activities. There was also a general view endorsed by all the participants that young people mostly do not respect the older generation if they are poor. But if they do have money the old people gain respect in every area. The legal framework has become very strong on these issues enabling old parents to take a complaint through the courts against their children if they are not looking after them. In reality though, parents rarely approach the court as they don't want to display the humiliation of their children's disrespect. In the main the responses to older people were very much in the direction of meeting the material needs of older people. They were mostly talked about in relation to BPL cards and pensions, and sometimes with regard to health – specifically eyesight. There were a few mentions of how older people contribute to society and how their skills could be built to enable them to live more fulfilling lives.

4.2. Defining marginalisation

Most of the WBCSSP programme is concerned with addressing marginalisation of groups, who include Scheduled Tribes, Scheduled Castes Muslims, women and people with disabilities. Discussion revealed a range of definitions of what constitutes marginalisation. Marginalisation was seen as being about economic hardship with people having neither food nor shelter, to exclusion from social engagement in society. For example, a participant talked of someone who did not have the resources to attend a funeral and had thus been excluded from family matters. Another participant referred to how older people belonging to scheduled caste and scheduled tribes are even deprived from entering the temple and are asked to sit separately.

4.3. The Role of civil society

Given the relatively powerful role that organized civil society plays in influencing policy and the implementation of government programmes it has a role to play in supporting issues of concern to older people as well as to other sections of the community. These roles can be played out in different ways:

- a) Older people are frequently members of the governing committees of CSOs – they can be drawn in to a very wide range of issues in this manner, rather than being seen only as having an interest in old age related issues;
- b) Many of the groups involved in the CSSP are working on gender issues and the empowerment of women. Older women could also take part in the empowerment programmes which would help build their confidence in their communities, and in seeking their pension and benefit entitlements;
- c) Income generation schemes and income enhancement schemes could also be made available to older people. Though it might be difficult for older people to take advantage of the National Rural Employment Guarantee programme as currently constructed because many of the jobs involve hard labour, CSOs that are concerned with making NREG more accessible generally could also include older people in their campaigning;
- d) Seeking to do capacity building with NGOs and CBOs who are working with old age persons;
- e) It was noted several times that older people do have easy access to the government schemes and benefits even when they are legally entitled to these;
- f) The participants suggested that WBCSSP could think structurally about the future of older people and develop a systematic means of addressing their concerns using the following steps:
 1. Identifying the needs of the older generation and responding to these needs in practical ways attention
 2. Recording and preparing documentation on these issues
 3. Developing thematic areas for policy advocacy to local government bodies
 4. Creating and contributing to efforts that seek to change public opinion for the protection of rights of older people.

4.4. Intergenerational work

A number of examples emerged of intergenerational work, namely where the young and old in the community were actively engaged in programmes to support each other. These projects were seen as being of mutual benefit to the young and old, in which they both learned from each other to make their lives better. They were seen as being of particular importance in situations where older people (usually women) either didn't have children or were being neglected by their sons and daughters because there was not enough money in the household to support them. Examples of these schemes included:

- Young members of local clubhouses providing volunteer support to bring patients to and from hospital for their eye operation
- 'Adoption of granny' programme where the assistance of experienced aged grannies is being drawn on to support pregnant women and to train new mothers;
- 'Grannies' conducting awareness programmes such as stopping child marriage, girl child discrimination and various types of superstitious beliefs in their society.

Learning can be taken from all of the issues highlighted above to feed in to other programmes, which may on the surface look quite different but where skills, such as young people helping their elders to access health care, are similar.

5. Reflections and conclusion

It was very stimulating to meet the participants from WBCSSP and to witness such a wide range of activity. On reflection many of the activities being carried out have the potential for including the interests of older people without necessarily being resource intensive.

The substantial evidence which emerged from the intended and unintended work with older people demonstrated the many different roles that CSOs can play in relation to older people: from including older people on management boards to supporting older people in acting as volunteers and mentors to younger members of the community. Some of the roles that older people play in their communities are perhaps going unacknowledged and could be built on to benefit older people themselves as well as and the community.

There seemed to be opportunities for developing more advocacy in promoting the rights of older people. The fact that many old people do not have any income and are not able to work anymore to earn any money means that they too are economically and socially marginalised. The absence of affordable and accessible health care for older people themselves is also a huge problem and one that will grow with the increase in numbers of older people, especially in rural areas where younger people are moving away. Many of the WBCSSP are engaged in gaining rights for different marginalised groups, and it would be important to ensure that older people as a group themselves, as well as being members of different marginalised groups also have their rights represented to local government bodies, so that they get their entitlements to a BPL card, food and pensions.

Many of the projects put an emphasis on 'empowerment' of the groups they work with – this is just as relevant to older people, who are often the most vulnerable in the society,

especially where they are living on their own or in households which cannot afford to support them. But empowerment is more than seeking food and shelter: it is about enhancing people's status and confidence in their society to help them use that power so that they can take more control over their own lives.

Finally there were some areas of activity highlighted, including globalisation, water, micro-finance and disaster management, which on the surface did not appear to relate to older people. There is sufficient evidence though to show that globalisation is contributing to the changes in support for old people as families migrate to urban areas or overseas; that older people are often the worst affected in disasters because they are often living in the worst conditions and are unable to move away; that they cannot get access to small loans though they are in desperate need of income and of course they also need to be able to access clean water and sanitation.

Old people need the support now. They face a heightened risk of poverty and a lack of health and welfare services and infrastructure, while their needs compete with those of still large and growing cohorts of younger people. Pro-poor development is about increasing the quality of life of all people – and that needs to include older people.

Organisations can take action now by increasing their own awareness of what is going in their local communities and finding how older people living in their area are accessing and using the different services available in their communities. Young and old could work together on this by carrying out social surveys of their communities, and using the information collected to assist with advocacy for older persons. And together communities, districts and municipalities could make an expression of solidarity for older people by celebrating the United Nations International Day of Older Persons held on 1st October each year.

*Appendix 1***List of Participants attending Consultation Workshop on Older People
7 April 2009**

Name of Participant	Organisation Name
Pritam Dey	Paschim Banga Jatiya Bayaska Shiksha Parsad (PBJBSP)
Sanjay Acharya	PBJBSP
Monalisa Datta	SANCHAR
Dr. Mrityunjoy Jana	Sristy for Human Society
Md. Shah Alam	Amanat Foundation Trust
G.M Shahid	Amanat Foundation Trust
Pratim Raba	The Calcutta Samaritans
Pranabesh Maiti	The Calcutta Samaritans
Anibrata Pramanik	Griha Adhikar Manch
Md. Bulbul Hossain	Southern Health Improvement Samity (SHIS)
Subir Dey	Paschim Banga Yuba Kalyan Manch
Chandan Mandal	Liberal Association for Movement of People (LAMP)
Jayanta Ghosh	All India Council for Management Education & Development (AICMED)
Subrata Sardar	Self Help Group Promotion Forum
Tapati Naskar	NISHTHA
Mina Das	NISHTHA
Nabamita Banerjee	Society for Participatory Action (SPAR)
Arup Biswas	Association for Health Advancement (ASHA)
Swapna Sultana	Jabala Action Research Organisation
Bidyut Debnath	Calcutta Society for Professional Action in Development (SPADE)
Saradindu Banerjee	PRIA, West Bengal
Twisha Ganguli	PRIA, West Bengal
Anjan Sarkar	PRIA, West Bengal
Valerie Lipman	University of Southampton, UK

*Appendix 2***Survey for West Bengal Civil Society Support Programme**

My name is Valerie Lipman. I am carrying out research for my doctoral thesis about the engagement of old people in international development. I am based at the University of Southampton, UK, and am doing my field research in Kolkata. As part of my research I am keen to capture the views and experiences of those who are working at the grassroots with their communities. I would be very grateful if you would fill in this survey and return it to me by email or post. There are no right or wrong answers, I am simply trying to find out how an internationally funded civil society works with old people. All of the information you give will be treated confidentially and reported anonymously. If you would prefer not to give me your contact details please omit your own name and address, and just give the name of the organisation. If it is easier for you to attach other information than fill out the form I would be very happy to receive that instead. *Dhanyabad.*

A) About You

Your Name	
Job Title	
Name and address of your organisation	
Tel No / Email	

Are you happy for to be contacted for interview? Yes No

Your Age _____ Your Gender Female Male

B) About Your Project

1. What are the overall aims of your organisation?

2. What is the title and aims of your project for WBCSSP?

3. Who is the target audience of your CSSP project and what geographical area does it seek to cover?

4. Why have you chosen this particular project theme and group of people?

5. What do you hope your WBCSSP project will achieve?

6. Which areas do you think will be the easiest to achieve

7. Which areas do you think will be the hardest to achieve and why?

8. How did the WBCSSP project come about? Which sections of the community were involved in developing it?

9. Have there been any external influences in creating your project e.g. District Council, Panchayat, Gram Sabha etc?

10. How many people have you already reached? What is the make-up of them e.g. gender, race, age

11. What difference has the project made to the community and to lives of individuals?

D. Old People (approx 60 plus years)

12. Do you know what is happening to old people in this community e.g. how many, how many live alone, are working, have mobility difficulties

Yes No Don't know

13 Do you feel old people are contributing to the community?

Yes No Don't know

If yes, please give examples, e.g. as volunteers, paid workers in the project, mentors, carers

14 Do you think old people are receiving sufficient support in the community?Yes No Don't know

If yes, please give examples of support e.g. children, other relatives, pension

15. Do you know if older people are benefiting from your projectYes No Don't know **If yes, how are they benefiting?**

16 Do you have any old people employed in your WBCSSP project?As volunteers: Yes No Don't know
As paid staff: Yes No Don't know **17. If old people are not included in the programme or are not benefiting what would encourage and/or enable your WBCSSP to be inclusive of older people?**

18. Is there anything else you would like to tell us, which hasn't been covered here.

Many thanks for the time and thoughts you have given in completing this questionnaire. Please return it within the next 2 weeks to my email address below or send it to the following address: Valerie Lipman c/o PRIA, GC -126. Sector – III, Salt Lake City, Kolkata – 700 106, West Bengal or email valerielipman2003@yahoo.co.uk

Appendix 3: Briefings for WBCSSP workshop

A Briefing & Resources: Global Ageing

‘We have to meet the needs of present generations and improve their quality of life without compromising the ability of future generations to meet their own needs.’

Thoraya Ahmed Obaid, UNFPA Executive Director, 2008

Introduction

The aim of this briefing is to give you an overview of what is happening for old people in India today. It is presented in the context of global changes and developments which are affecting old people throughout the world. Globalisation affects everyone at every level in society, and old people are not exempt from this. Some of the technological developments of the last few years such as the mobile phone, have brought positive benefits for improving the inclusion of all groups, but overall development has not sought to include old people as contributors or activists, nor as beneficiaries and people in need of support.

I. What is happening globally?

The world’s population is steadily ageing as a consequence of the long term reductions in both fertility and mortality, and increase in life expectancy. Over the next forty years half of the increase in the world population will be accounted for by a rise in the population of those aged 60 years or over, whereas the number of children (persons under age 15) will decline slightly.

Older people are now the world’s fastest growing population group: every month one million people turn sixty years of age, eighty per cent of who are in the developing world. Of an estimated 673 million people aged 60 and over, 430 million live in less developed regions. This number is set to increase rapidly over the next half century due to the combined forces of population growth and the speed of age-structural change in these societies (United Nations, 2007). By 2050 one in five persons will be over sixty and for the first time in history people in this age group will outnumber children.

For the developed countries the growth in their older population came after those countries became rich. Ageing, however, is occurring rapidly and at much lower levels of social and economic development in the countries of the South. Older people face a heightened risk of poverty, a lack of services and infrastructure, while their needs compete with those of still large and growing cohorts of younger people. Most development programmes continue to focus on maternal and child health, education and training for children and young people, infrastructure developments, and increasingly the

environment. There is sufficient and longstanding evidence to show that as a result of modernisation, family support is breaking down in places and despite the best efforts of their families and societies, older people are not being sufficiently well looked after. There has been a slow, gradual increase in interest about ageing populations world-wide. The future impact of so many old people will be enormous on societies and economies. It is something to be proud of that people live longer, but it has to be a life worth living. There have been two international summits on World Ageing, held 1982 and 2002. Following the 2002 Summit, held in Spain, a very extensive plan was produced with major targets and goals: The Madrid International Plan of Action (MIPAA).

This Plan is a norm-setting platform for global action in ageing in the 21st century. It is aimed at developing a society for all ages. It commits Governments to focus their age-related action on three priority directions:

- older persons and development;
- advancing health and well-being into old age; and
- ensuring enabling and supportive environments.

Unfortunately few resources have been allocated to helping countries formulate and implement their plans on ageing. At the United Nations in New York there is a small department which produces written guidance on how to prepare plans and monitor their progress. This department of four people is the only dedicated resource provided by the UN globally to promote the MIPAA.

India played a role in the formation of the MIPAA and is an active member of the Economic and Social Commission for Asia and the Pacific (ESCAP) which has formulated a regional programme for implementation on ageing. The objectives and goals of this programme were reviewed at a 5 year Regional meeting held on 9-11 October 2007 in Macao, China.

II. The situation for old people in India

Population projections for India show an increasingly aging population.

Percentage of Elderly Persons to Total Population

Year	Elderly persons	
	(millions)	% total population
2001	70.69	6.90
2006	83.58	7.50
2011	98.47	8.30
2016	118.10	9.30
2021	143.24	10.70
2026	84.62*	12.40

*Source: Table 6.18 Government of India Eleventh 5 year plan 2007 – 2012 [*NB – Appears to be misprint, and should probably read: 184.62]*

It is often argued that there are not many old people in India, and thus it is not a priority to identify their needs. The number of people over the age of 60 is approximately the same as the number of Tribals in India, and also the same as the number of 0 – 6 years old in the country.

In India, as in many countries world wide there have been significant changes in society, which are resulting in having to look at how to support the interests and needs of older persons in our communities. The key changes are concerned with:

- Rise in Life expectancy – there are more people living till old age than ever before. This is a huge development success and something to be applauded;
- Joint family system – this has traditionally been the heart of support for older persons in India. There is a lot of evidence though that this is beginning to break down, and more so in urban areas, as younger members of the family migrate to other towns, states or countries to find paid employment;
- Increasing cost of living –higher living expenses and education costs for children make it harder for families to look after their older parents or relatives, or to pay rent on accommodation large enough to house everyone;
- Changing attitudes to older persons – many people talk of an erosion of traditional values among the young, and a lessening of respect for their elders. Some of this is attributed to the adoption of western values;
- Financial and social insecurity of older persons – the majority of people of retirement age do not have a pension of any sort, and have either to continue working or are dependent on their families for support. As the cost of living increases, it is harder for families to continue supporting older parents

The Country assessment of the ESCAP Plan (see above) showed that gradual change in policies and programme approaches have been taking place reflecting greater fiscal sensitivity in the allocation of public resources to meet the increasing needs of old age. However the review showed that inadequate allocation of funds and difficulties in acquiring expertise and knowledge continue to hinder Governments' efforts to develop more effective interventions to meet the growing demands of old age. Currently, income security in old age, raising public awareness about the benefits of active ageing, and generational solidarity preoccupy policy agendas on ageing in the majority of countries in the region. It is important to note that due to financial constraints, many countries in the region such as Bangladesh, India, the Democratic People's Republic of Korea and the Republic of Korea targeted their social security programmes to the poor and persons with disability.

III. Selected Resources

International

- Madrid International Plan for Action on Ageing 2002
- MIPAA ESCAP Update 2007
<http://www.unescap.org/esid/psis/meetings/AgeingMipaa2007/RegionalReviewofMIPAA.pdf>

Useful Contacts

1. **Calcutta Metropolitan Institute for Gerontology** contact: <http://www.cmig.in/>

Primarily a training and research centre concerned with old people. They provide off the shelf and tailor made training courses.

2. Help Age India West Bengal – contact: anuradha.sen@helppage.india.org or phone: 033-22488070. Will run sensitisation courses to meet organisations needs. Provides advocacy and services for older people and campaigns.

3. Ministry of Social Justice and Empowerment – has responsibility for the National Coordination of the MIPPA Ageing Programme for India. The Ministry is responsible for:

- Governmental Policy formulation
- Coordination/monitoring/evaluation of activities on ageing
- Advocacy and promotion of the rights of older persons
- The Ministry provides financial assistance to NGOs for establishing and maintaining old-age homes, day-care centres and mobile medicare

Contact office Joint Secretary to the Government of India, Room No. 616, Shastri Bhavan, A Wing, New Delhi 110001 Tel: (91-11) 3381641, 4108457 Fax (91-11) 3384918

More reading if you're really interested

- Cohen, L. (1992) *No aging in India: The uses of gerontology Culture, Medicine and Psychiatry*, **16, 2**, 38
- HelpAge International (1999) *The Ageing and Development Report* Earthscan
- Liebeg P. S. and Rajan S. I. (2005), *An Aging India: Perspectives, Prospects and Policies* Rowat Publications
- UN (2007) *Development in an Ageing World* United Nations
- UN (2006) *Guidelines for review and appraisal of the Madrid International Plan of Action on Ageing* United Nations

'The foremost challenge lies in supporting the new opportunities for older persons and the benefits for society that arise from the ageing of populations.'

Frederick Fenech, International Institute on Ageing, Malta 2007

B Overview of Government Structure, Policies and Entitlements relating to older people in West Bengal

Article 39 (a) of the Constitution of India says, '*the State shall, in particular, direct its policy towards securing (a) that the citizen, men and women equally, have the right to an adequate means of livelihood*'. Article 41 of the Indian Constitution encourages the state to make effective provisions for public assistance, within the limits of its economic capacity and development, in cases of unemployment, old-age, sickness and disablement and in other cases of undeserved want. Both the Central and State Governments are empowered under Entry 23 of List III (Concurrent List) to make provisions with regard to social security and social insurance¹⁴³.

1. National Policies and Resources for old people

- a) India Government Eleventh 5 year plan 2007 – 2012** (published by: Planning Commission, Government of India). The Plan contains specific references and duties to old people and sets out a number of initiatives. Areas of specific concern to old people are set out in Volume 1: Chapter 6 (paras 6.188 – 6.196) on Social Justice which is concerned with minorities and vulnerable groups (see Appendix 1 for detail). Volume 2 recognises the different health needs of older people and also introduces specific initiatives, such as increasing training in geriatric care. Additional references to old people/the aged/elderly people can be found in Volumes 3: in which 'old people' are listed among other categories who should benefit from housing and other infrastructure development.
- b) Integrated Programme for Older Persons** – a Ministry of Social Justice and Empowerment programme targeted at Voluntary Organisations. This is specifically concerned with the direct delivery of services for old people. The government will fund 90% of all running costs of direct services for old people, as listed below:
1. Maintenance of Old Age Homes
 2. Maintenance of Respite Care Homes and Continuous Care Homes
 3. Running of Multi-Service Centres for Old Persons
 4. Maintenance of Mobile Medicare Units
 5. Running of Day Care Centres for Alzheimers Disease/Dementia Patients
 6. Physiotherapy Clinics for Older Persons
 7. Disability and hearing aids for Older Persons
 8. Mental Health Care and Specialised Care for the Older Persons
 9. Help-lines and Counselling Centres for Older Persons

¹⁴³ Source: Older Persons Maintenance, Care and Protection Bill, 2005

10. Sensitising Programmes for children, particularly in schools and colleges
11. Regional Resource and Training Centres
12. Training of Caregivers to the Older Persons
13. Awareness Geriatric Programmes for Older Persons and Care Givers
14. Multi-facility Care Centre for destitute older widow women
15. Volunteer Bureaus for Older Persons
16. Formation of Vridha Sanghas/Senior Citizen Associations

Source: <http://socialjustice.nic.in/social/sdcop/opersons.htm#op5>. Accessed 7 March 2009

c) National Policy of Old Persons –India 1999.

The policy emerged as follow up to the International Year of Older People of 1999. The Policy acknowledges the contribution older people make to society, as well as drawing attention to their care and welfare needs. Mention is made of the role that NGOs can play in working with and for old people. ‘The National Policy of Older Persons recognizes a person who is 60 years of age and above as a Senior Citizen. It resulted in the creation of the National Council of Older Persons. This Council is taking steps to ensure that the age of 60 years and above becomes the uniform age for availing all facilities and benefits to senior citizens’.

(http://india.gov.in/citizen/senior_citizen/general.php accessed 13-2-09).

d) Old Age Pension 2007 – The Old Age Pension has been made available to everyone over the age of 65 who is living Below the Poverty Line (BPL). This is a national policy which each State has been requested to deliver. National government allocates 200Rs per person. This amount is supposed to be matched by a further 200Rs from the State, but the additional amount is not obligatory on the State.

e) The Scheme of Assistance to Panchayat Raj Institutions/Voluntary Organisations/Self-help Groups for Construction of Old Age Homes/ Multi-Service Centres for Older Persons. Under this Scheme NGOs can apply for a one off construction grant to their State Governments or UT Administrations

f) The Maintenance & Welfare of Parents and Senior Citizens Act 2007. Adult children and grandchildren who are earning members are required to maintain and take care of their parents or grandparents. Maintenance includes the provision of proper food, clothing, housing and medical treatment. Three other key welfare measures are included for in the Act

- Better medical facilities
- Protection of life and property
- Old Age Homes in every District

A role for NGOs has also been legislated for under the Act e.g. for filing maintenance applications on behalf of the elderly if he or she is unable to do so himself/herself, for reconciliation and representation of his/her case if unable to do so and authorizes someone else to represent and facilitate.

- g) Other national concessions** – other government departments, such as the Railways, Telecommunications and public health services offer a few minor concessions for older people, such as priority in queuing for services, access to certain seats and priority for complaining.

2. National Legislation of benefit to old people but not specifically targeted to them.

- a) **Annapoorna Yojana** – free rations of food grains of 10kg per beneficiary per month, for old people not covered by the old age pension scheme.
- b) **Antyodaya Yojana** – heavily subsidised food grains (rice or wheat) scheme at the rate of 35kgs per family per month. Old people from the BPL category are given priority for identification
- c) **Fair Price Shops** - Instructions have been given to State Governments for giving priority to Ration Card holders who are over 60 years of age in Fair Price Shops for issue of rations
- d) **National Rural Employment Guarantee Act (2008)**. Help Age India is trying to see how it can be used/applied to older people
- e) **Aam Aadmi Bima Yojana** – A life and disability insurance cover from the government available for the rural poor. The scheme is targeted to cover 30-40 million families.

3. West Bengal Policies for older people

- a) **Old Age Pension** – there are two elements to this in West Bengal
- National Pension Scheme: West Bengal allocates its 200Rs per old person over the age of 65 years to match the National Pension (see 1d above)
 - West Bengal Department of Social Welfare: The State of West Bengal has made an allocation available of 750 Rs per person per month for 66,000 people over the age of 60. This is a limited fund and is allocated on a competitive basis by the Block Office.

- b) **Disbursement of Old Age Pension from Own Fund** – ‘When the required fund on NOAPS account is not made available to a GP within the appropriate time, such GP in order to redress the hardship of these destitute persons shall be at liberty to apply as a temporary arrangement its own fund for the purpose of disbursing pension to the beneficiaries of NOAPS with the condition that on receipt and credit of fund to the NOAPS account admissible to the GP, the own fund of GP shall be recouped in full without any loss of time. Some of the GPs have started disbursing NOAPS at the beginning of the month in anticipation of receipt of allotment resulting in more timely payment of pension by the poor senior citizen of their areas’. (2006-07 Annual Report of Panchayats & Rural Development 2.2 vi)
- c) **Work related pensions** – a few old age pensions are also available for Fisherman, Farmers, Artisans and Handloom Weaves from different departments within the Government of West Bengal. The funds available for these are very limited.
- d) **Old Age Pension to Tribals** – available from Department for Backward Classes Welfare
- e) **Homes, Day Centres and Mobile Medical Units** – there a number of government funded direct services available for old people. See attached list.

4. West Bengal Policies relevant but not targeted to old people

- a) **West Bengal Plan:**
<http://mohfw.nic.in/NRHM/State%20Files/wb.htm#sp> In line with National Government West Bengal has developed a Rural Health Mission programme. There are no references to old people in the Proposed Implementation Plans for 2008-09 – emphasis on maternal and child care, and an allocation to Tribals, ‘handicapped’. There is a section called vulnerable groups, who receive nothing in the main budget, but are picked up by some underspend elsewhere. ‘Vulnerable’ is not defined.
- b) **West Bengal Human Development Report 2004** – produced in conjunction with the United Nations Development Programme (published by Development and Programme Department). There is no section about old people and ageing. The section on demography makes no mention of the ageing society; there is no age breakdown given in any of the data; and there is nothing in the section on health, indicating different health needs of old people.
- c) **Department of Health and Welfare – statement on Demographic Change and Ageing in West Bengal**
http://www.srcwb.org/download/demographic/2007/April_Aged_Population_An_Overview.pdf. This 4 page paper discusses the overall the needs

of older persons in West Bengal and how these are not being taken on board by government departments.

- d) Community Health Care Management Initiative (CHCMI)** The Panchayats and Rural Development Department, Government of West Bengal has set up the CHCMI to assist with the convergence of services at the community level. Though the stated focus is on child mortality and maternal care, there is also a lot in the Initiative about disease prevention and management, sanitation, clean water etc. all of which are of relevance to old people.

Note 1

Extract from National Eleventh 5 Year Plan 2007 – 2012 Commitment to older people

Chapter 6 Social Justice: Scheduled Castes, Scheduled Tribes, Other Backward Classes, Minorities, and Other Vulnerable Groups

‘Introduction

‘6.1. Inclusive growth demands that all social groups have equal access to the services provided by the State and equal opportunity for upward economic and social mobility. It is also necessary to ensure that there is no discrimination against any section of our society. In India, certain social groups such as the SCs, STs, OBCs and Minorities have historically been disadvantaged and vulnerable. Then there are certain other groups which may be discriminated against and which suffer from handicaps. These include persons with disabilities, older persons, street children, beggars and victims of substance abuse.’
(P102)

p130 ‘OTHER VULNERABLE GROUPS

6.171. This section deals with certain other groups that suffer social and economic handicaps which must be addressed to ensure to them equality of economic opportunity and equal access to services by the State. Steps are also needed to prevent social discrimination against them. These groups include persons with disabilities (orthopaedic, visual, hearing, speech and mental disabilities), older persons, victims of substance and alcohol abuse, and so on.’

OLDER PERSONS

6.188. India has the second largest population of older (60+) persons in the world. The number of older persons in the population is expected to increase from 71 million in 2001 to 173 million in 2026. A majority (80%) of the elderly population in India is in the rural areas, thus making service delivery to them a challenge, and there are a large number of 80+ persons in the country. Initiatives for Older Persons during the Tenth Plan.

6.189. As contemplated in the National Policy on Older Persons (NPOP), a National Council for Older Persons (reconstituted in 2005) has been set up to advise and aid the government on policies and programmes for older persons and to provide a feedback to the government on the implementation of NPOP.

6.190. The Maintenance and Welfare of Parents and Senior Citizens Bill, 2007 which has been presented to the Parliament, stipulates construction of at least one old age home in each district of the country to accommodate deserving and destitute senior citizens.

6.191. This intended Act will make the process for claiming maintenance simpler, speedier and less expensive. Further, the legislation would also ensure adequate medical facilities to older persons and protection of their life and property.

6.192. The programmes/schemes/incentives for older persons include income tax rebate, higher rates of interest in saving schemes, 30% concessions in all railway travel and 50% discount on basic fare for all domestic flights in the economy class in Indian Airlines, Jet Airways and others.

6.193. The Ministry of Social Justice and Empowerment implements an Integrated Programme for Older Persons through VOs. Under this scheme, VOs are given 90% grant for running old age homes, day care centres and mobile medical care units. Another scheme for construction of old age homes is being implemented through local SHGs, PRIs and VOs.

The Way Ahead

6.194. The Eleventh Plan proposes to further the rights based approach and also focus on bridging the gap between rural and urban areas.

6.195. A National Association for older persons, as per NPOP, will be set up. Protection of life and property by utilizing the services of Panchayats/Senior Citizens' Associations and other community-based groups and sensitizing and reorienting the law enforcement machinery to the vulnerability and special protection needs of older persons will be taken up in the Eleventh Plan.

6.196. The National Old Age Pension schemes will now be extended to all BPL persons above the age of 60 years. A pension of Rs 200 per month will be provided and States will be requested to add another Rs 200 to this scheme.'

Note 2**Extract from West Bengal Women and Child and Social Welfare and Development**

Accessed from Government of West Bengal website 5 March 2009

<http://www.wbgov.com/E-gov/English/Departments/DeptIndex.asp?DpId=265>

WELFARE FOR THE AGED**1. HOME FOR THE AGED (GOVT)**

SI No	Name	Address
	Home for the Political Sufferer and aged and Infirm Middle Class people and Shantineer	P.O. South Garia, Dist South 24 parganas, Pin - 743613; Ph 95321 8260476

2. HOME FOR THE AGED (NON-GOVT)

SI no	Name	Address
	MIDNAPORE	
1	Hitaljore Kishoribala Databye Chikitsalaya	Hitaljore, Sabang, Midnapore
2	Child & Social Welfare Society	Marcondachak, Midnapore
3	Bikramnagar Udayan Sangha	P.O. - Haria, Midnapore
4	Roychawk Morning Star Club	Roychawk, Sapnagachia, Midnapore
5	Vivekananda Lok Shiksha Niketan	Vill.- Faridkot, P.O.- Dakshin Dauki, Midnapore
6	Amar Seva Sangha	Vill & Post - Raina, Midnapore
7	Social Welfare & Rural Development Society	Vill. - Konnagar, P.O. - Ghatal, Midnapore
8	Seulipore Udayan Club	P.O. - Paschimbar, Midnapore
9	Sain Pukur Atri Sevika Samity	Sabang, Midnapore
10	Netaji Patha Chakra	Haria, Midnapore
11	West Bengal S.C., S.T. & Minority Welfare Association	Rabindranagar, Midnapore
12	Shibrampore Milan Tirtha	Vill. & P.O. - Shibrampore, Midnapore
13	Barabari Netaji Seva Sangha	Barabari (S), Block-Nandigram-II, Midnapore
14	Nimbark Math Seva Samity Trust	Baikunthapur, Midnapore
	KOLKATA	
15	Nabadiganta	29 Banerjee para Road, Sarsuna, Kolkata-700061
16	Women Coordinating Council	5/1 Red Cross Place, Kolkata-700026
17	All Bengal Womens Union Home	89 Elliot Road, Kolkata-700016
18	Ramkrishna Satyanabda Ashram	46/2 Desh Bandhu Road, Kolkata-700032
19	Janasiksha Prochar Kendra	57-B, College Street, Kolkata-700073
	HOOGLY	
20	Kalyan Bharati, Balak Bhavan	Kamarkundu, Hoogly

	HOWRAH	
21	Council for Advancement of Rural and Downtrodden People	Bagnan Station Road (North), P.O. - Bagnan, Howrah
22	Village Welfare Society	P.O. - Pancharul, Howrah
	MALDA	
23	Rural Health Development Centre	P.O. & Vill. - Bachamari, Malda
	NADIA	
24	Chandranath Basu Seva Sangha	1 B.T. Road, P.O. - Karimpur, Nadia
25	Karimpur Social Welfare Society	Tarakdas Road, P.O. - Karimpur, Nadia
	NORTH 24-PGS	
26	Jirakpur Sister Nivedita Seva Pratisthan	Jirakpur, P.O. Basirhat, Dt- 24 Pgs(N)
	SOUTH 24-PGS	
27	Ganeshnagar Laxminagar Club-O-Pathagar	Ganeshnagar, 24 Pgs(S)
28	Vivekananda Child Welfare Home	P.O. - Kakdwip, 24 Pgs(S)
29	Banga Development Centre	Bhangore, 24 Pgs(S)

3. DAY CARE CENTRE FOR THE AGED (DCC)

SI No	Name of Centre	No of Centres
1	CMG, Sopan Kutir, Dr. S.C. Mukherjee Road, Kolkata-10.	1
2	Do, Purbalok, K.M. By pass	1
3	Jay Prakash Institute of Social Change Birbhum	1
4	Do Midnapore (W)	1
5	Seulipur Udayan Club, Seulipur, Midnapore (E)	2
6	R.K. Satyananda Ashram Balgona, Burdwan.	1
7	Srikrishna Pratisthan, Kakulia Road, Kolkata.	1
8	Village Welfare Society Pancharul, Howrah.	1
9	Chiranabin Howrah	1
10	R.K. Satyananda Ashram, Basirhat, North 24 Parganas.	1
11	Bansgeria Prative Club, Midnapore.	1
12	Udaynarayanpur Azad United Club, Howrah.	1
13	Manbhum Ananda Ashram, Purulia	1

14	Midnapore District Community Development Centre Council, Midnapore (W)	1
15	Uttarbar Sukanta Smriti Pathagar, Midnapore (E)	1
16	Amar Seva Sangha , Midnapore	1
17	Elmhirst Institute of Community Studies, Birbhum.	1
18	Bhagra Diamond Club, Burdwan.	1
19	Bagnan Chamber of Commerce & Industry, Howrah.	2
20	Nabadiganta, Kolkata.	1
21	Biplabi Rural Development Society Malda	3
22	Gangadhar Chak Dewan Chak Vivekananda Club	1
23	Haldia Samaj Kalyan Parshad	3
24	Prabuddha Bharati Sishu Tirtha , Midnapore	1
25	Social Welfare and Rural Development Society, Midnapore.	4
26	Uttarbar Sukanta Smriti Pathagar Midnapore.	1
27	Jirakpur Sishu Nivedita Seva Mission	2
28	Ganesh Nagar Laxminarayan Club and Pathagar, 24 Parganas South	1

4. MOBILE MEDICARE UNIT (MMU)

SI No	Name of Organisation	No of units
1	Barabari Netaji Seva Sangha, Midnapur (W)	1
2	R.K. Satyananda Ashram	1
3	Ichapur Brahaminpara Silpa Niketan, North 24 parganas	1
4	CMIG Kolkata -10	1
5	Amar Seva Sangha, Midnapore	1
6	Vivekananda Adibashi Kalyan Samity, Bankura.	1
7	Barabari Netaji Seva Sangha, Midnapore.	1