

Framing ageing policy: Justifying reforms in Norway and the UK

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Abstract

Ageing policy, defined as policy measures to address the consequences of demographic ageing, has emerged as one of the major challenges both at the global and the national level. A global trend of ageing policy has focused on the supply side of labour, assuming that the demand side will take care of itself. In present times of economic crises, the promises of ageing policy are put to test. Are older people needed in the labour market and do politicians step up policy measures needed to include all who want to work, when there is a slope in the economy?

We focus on the national level and ask how the challenge of demographic ageing is answered and how ageing policies are justified in Norway and the UK. Our centre of attention are on some of the key political actors; governments, ministries and political parties, and aims at identifying their different policy frames. On the basis of expected variation in how ageing policies are formulated and justified across the two countries this leads to the question of how to explain this variation.

A main argument in this paper is that ageing policy reform relies on political actors' ability to frame policy alternatives in order to sell them to the public while constructing the need to reform (Béland, 2005). Thus, both legacies in the form of political, economical and welfare institutions and the political debate where actors try to sustain, alter or remove precisely these arrangements are important in shaping ageing policy outcomes (Ervik, Helgøy, & Christensen, 2008).

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Introduction

Ageing policy, defined as policy measures to address the consequences of demographic ageing has emerged as one of the major challenges both at the international level and on national agendas. Much ageing policy has focused on the supply side of labour, assuming that the demand side will take care of itself. This perspective is acutely important in times of economic crises as experienced at present, because now is the time when the promises of ageing policy are put to test. Are older people needed in the labour market and do politicians step up policy measures needed to include all who want to work, when there is a slope in the economy or are the promises easily forgotten? Atkinson (2008) points out the potential role for government policy, arguing that ‘if governments can take on the role as of lender of last resort, then we should be willing to see government as the employer of last resort’. If the market cannot activate older workers, will the state step in to fulfil this promise?

In this paper we focus on the national level and ask how ageing policies are delimited and justified in two European countries, Norway and the UK. We scrutinize the argumentation and justification of some key political actors in ageing policy. How are ageing policy defined and understood by different actors and how is the agenda of ageing policies decided by the politics of ageing? On the basis of expected variation in how ageing policies are framed and justified across the two countries this leads to the question of how to explain this variation? In addressing this question our hypothesis is that institutional legacies in the form of political, economical and welfare institutions are important in shaping the outcome and practice of ageing policy ideas in different countries, but that such path dependencies may be modified just because these institutional structures are part of the political debate where actors try to sustain, alter or remove these arrangements (Ervik et al., 2008).

A main argument in this paper is that ageing policy reform relies on political actors’ ability to frame policy alternatives in order to sell them to the public while constructing the need to reform. The policy alternatives tend to constitute a kind of stable ideological repertoire which actors draw on to construct frames in order to achieve broad societal support for the suggested policy alternative (Béland, 2005). Within ageing policy such a repertoire or paradigm manifested itself as a “burden of ageing discourse”(Walker, 2009). Emerging at the grassroots level in the late 1980s and early 1990s and further developed by academics, such as Walker himself, a new alternative discourse came into shape, the “active ageing discourse”. Keywords were human rights, participation, social inclusion and anti-age discrimination (op.cit).

Empirically the paper draws on different sources; it combines analysis of party manifestos of the major political parties, political speeches, key government policy documents and the parliamentary debate on these documents to bring out arguments and justifications of reforms within ageing policy. In addition, we rely on interviews with key policy actors.¹ The empirical material will mostly cover the last ten years of policy discourse in the two countries.

Although this paper is mainly of an empirical nature, we start out with a brief theoretical section, which includes a discussion of the concept of ageing policy and how it relates to the problem of identifying a clear institutional affiliation of this policy area. The third and fourth section contains the main empirical part of the paper and presents analysis of party manifestos and policy documents in the two countries to identify the extension, content and conflicts of ageing policy. These sections are tentatively structured/organized around the different streams (problem, policy and politics) of Kingdon's agenda setting theory (Kingdon, 1995). The last section sums up and concludes the paper.

Theoretical approach and conceptual discussion

Policy Ideas and institutions

As a way of organizing and analyzing the empirical material we draw on parts of Kingdon's theory of agenda setting and the application of this approach by Béland (2005). Agenda setting consist of joining together three independent streams of problems, policy and politics (Kingdon, 1995:19). Three components are central in this theory: Firstly, the problem stream which covers the selection (by policy actors) of important public problems that are put on the political agenda. Secondly, the policy stream includes the actors belonging to a policy community, who are active in framing policy alternatives and solutions to conceived problems, at a general level or within a specific field. Thirdly, the political stream is composed of election results, public moods, pressure groups, partisan distribution in parliament, and changes in government and administration (Kingdon, 1995: 145). Key in this stream are so called policy entrepreneurs which are instrumental in bringing together the three streams in terms of framing solutions that are supported and promoted by powerful actors (Béland, 2005: 10). Policy ideas often have more consistency than what is suggested by

¹ At present only recent interviews conducted in June for Norway are available. The text does not yet present a full analysis of these interviews, but do provide some provisional findings. Interviews were also planned for the UK. Because of the upcoming election in May, these interviews had to be postponed until autumn this year.

Kingdon's conception of independent streams, and the assumed lack of rationality in the policy process. This is because most frames and alternatives are grounded in policy paradigms which constitute a structured intellectual background, providing a relatively coherent set of assumptions about the functioning of economic, political and social institutions (Béland, 2005: 8). Therefore policy paradigms contain both cognitive and normative aspects and entail a programmatic feature, aiding policymakers in keeping, reforming or replacing existing programmes (Campbell, 2002; Hall, 1993; Schmidt & Radaelli, 2004). Policy ideas are embedded in existing institutions as part of their defence and legitimacy and at the same time other opposing policy ideas contain visions of alternative institutions. Hence, a policy ideas perspective is also an institutional perspective. In the empirical analysis following, we concentrate on the content of ideas within the different streams and we don't cover all relevant actors in the policy communities.

Ageing policy: A policy with no institutional "home"?

Many policy areas have clearly defined borders and have their institutional home within specific ministries, for instance defence policy. Ageing policy defined as: policy measures to address the consequences of demographic ageing, implies initially a host of relevant policy areas within the ambit of the welfare state, economic policy, migration policy, and technological policy to mention some of them. It cannot be delimited to a clear ministerial 'residence' in the same way as defence policy or say agricultural/fishery policy. At the outset the definition above does not emphasise or exclude more normative ageing policy definitions such as 'active ageing', 'productive ageing', 'healthy ageing', and 'successful ageing'. These policy ideas enter into the ageing policy discourse with more specific diagnosis of problems and how to solve them. Different actors within the policy community (ies) carry these ideas and seek to promote and eventually implement them with practical consequences for citizens in the respective country and perhaps beyond national borders. A broad and open definition of ageing policy opens up for comprehensive and cross-cutting approaches at the national level that go beyond traditionally more sector oriented focus. The problem of such broad definitions is of course that it becomes difficult or almost impossible to comprehend all relevant areas and delimit the research subject. Although the possible areas for ageing policy are very wide, the empirical reality, in terms of where the gravity of policy and political debate are found, has been concentrated on three main areas; pension reforms, health and the

labour market, with pension reform as heart concern (UNECE United Nations Economic Commission for Europe, 2007: 9-32).

In our search for ageing policy in the two countries we combine an analysis of party manifestos and analysis of broad and encompassing policy documents that address the ageing challenge.

Searching for Ageing Policy Ideas in Norway

Norwegian politics has for the last decade seen two majority governments of a red-green coalition type which has been in power since 2005 (Stoltenberg II and III). Before that a minority government (Bondevik II) consisting of three non-socialist parties governed from 2001, replacing a minority government of the Labour Party (Stoltenberg I, 2000-2001). During this period the most significant reform connected to the challenge of an ageing society has been initiated, planned and implemented (as from 2011). This pension reform and the process bringing it about is typical of the consensus oriented way of policy making in Norway. In the end, all parties, save for the right wing Progress Party, agreed on the main principles of the reform.

A second important development of ageing policy in Norway has been the promotion of 'senior policy', i.e., policy measures for improving labour market participation for senior workers, or the 50+. Institutionally, this 'working longer' policy idea, has been harnessed by the establishment of the Centre for Senior Policy (2001), which goal is to increase individuals, companies and politicians awareness of the benefits of working longer. Supported by powerful actors such as the Ministry of Work, the labour market organizations (employers and employees) and politicians, the Centre has been successful in framing ageing policy in a work –focused manner. The work of the Centre is also rooted in a broader inclusive working life agreement between the working life organizations and the government, which in addition to increasing the age of leave from the labour market, aims at reducing sick absentee as well as increasing participation from groups at the margins of the labour market. Also in this respect, the broad political consensus behind the promotion of senior policy is characteristic. Finally, there is a more 'traditional' component of ageing policy, consisting of elderly care and the health aspects of ageing.

Problem and Policy Streams in Norway: Achieving a sustainable ageing society by working more and longer

Since elections in Norway are held at regular intervals, this put parliamentary parties in a different position, than those of the UK, where the government can determine Election Day. In Norway the process of adopting new manifestos, follows a regular 4 year plan, between two elections, in contrast to countries such as the UK and others, and also leads to more comprehensive and voluminous manifestos, than in the UK (Allern, Bay, & Saglie, 2009: 63). For the Norwegian case, the analysis of party manifestos consists of two parts. First a keyword search was done for the period 1884-2001 for all the major political parties². The following keywords were applied (with first entrance and party name in parenthesis): Elderly policy (Conservative Party, 1981), Active old age (Conservative Party/Labour, 1989), Elderly care (Conservative Party, 1965), older workers (Liberal Party, 1964), the (tidal) wave of old age (Liberal Party, 1989), Senior policy (Centre Party/Progress Party, 2001), increasing longevity (Labour Party, 1981). Thus, we see that elderly care and older workers have been topics of manifestos for several decades. Looking into the frequency of keywords, measured as the number of programs they appear in, the same two words come out on top. Elderly care come out in 38 programs and older workers show up in 18. Elderly policy appears in 7 manifestos whereas active old age shows in 5 manifestos. Thus ageing policy is confined to traditional areas connected to elderly care policy and the labour market for older workers. More innovative concepts such as active old age and senior policy are less prominent within the manifestos. In addition to this cursory analysis, a more thorough content analysis of party manifestos was done for the three largest parties; Labour Party, the Conservative Party and the Progress Party, for the time period 1981-2013. Space only allows a brief summary of this content analysis.

Ageing policy as identified through the party manifesto is traditionally concerned with elderly care (quality of care and education and recruitment of care workers) and pensions policy. In addition, all three parties provide a positive image of older people and the need to improve condition for active participation in work and voluntary activities. 'Active old age' (Labour), 'dignified old age' (Conservatives) and 'senior policy' (Progress Party) all signify this positive view of older people. Apart from stressing the need to improve intergenerational

² The source for party manifestos was the latest edition of the database 'Vi vil! Norske partiprogrammer 1884-2001, collected and prepared by the NSD and ISF (Norsk samfunnsvitenskaplig datatjeneste & Institutt for samfunnsforskning, 2001). Through the NSD website, the database also includes manifestos for the period 2005-2013.

contact and meeting places, the manifestos does not reflect ageing policy as seen in a life-course perspective, it is confined to the category of older persons.

Whereas we find consensus on broader goals such as security in old age and the need to stimulate participation in working life, there are clear conflict lines between the parties in terms of the means of welfare policy and even on goals of policy. In pensions the Progress Party argues against the need for a pension reform, whereas these broad reform efforts are supported by both the Conservatives and Labour. However, in their latest working program the Conservatives stresses the need for further pension reforms, in terms of fund-based supplementary pensions, and so gradually leave PAYG financing, because it is seen to undermine generational balance. In old age care provision the parties are divided between the Conservative and Progress Party who both welcome more competition from private market providers, in order to improve quality and choice in care, and the Labour Party defending a strong public role in provision of elderly care.

Interviews with informants from these three parties confirmed a strong focus within the FRP on traditional elderly care policy with prominence on elderly persons' choice opportunities, and for strengthening the role of the state in directly financing these services. In addition, the need to scrap age limits, and allow people to continue work on their own decision was seen as crucial in their senior policy. Within the Conservative party emphasis was on pension reform and labour market, focusing on the '*utenforskapet*' /exclusion of 800 000 people in working age from the labour market. In addressing this challenge the informant, in addition to stressing the importance of economic incentives, presents a broader approach by including education, and competence investment within a life-course perspective. The informant from the Labour Party also underlined the importance of pension reform in reaching the goal of economic sustainability and labour market measures such as the Inclusive Work agreement, to increase labour market participation. This informant also stressed the importance of new technology within elderly care and medicine, and at the general level in terms of softening the effect of the ageing challenge (Interview No. 1 Norway, 2010; Interview No. 2 Norway, 2010; Interview No. 3 Norway, 2010).

The ageing of society represents a profound and long-lasting transformation and hence this call for long-term planning by government to be prepared to act and implement policy in the future. Norwegian policy formation has a long history of long-term economic programs and planning. The first long-term program was presented in 1948 as part of the Marshall plan

for the countries involved in the goal of restoring the European economy and society.³ Since 2004, long-term trend analysis have been continued in a new series of ‘Long-term perspective for the Norwegian Economy’ (*Perspektivmeldingen*) (St.meld. nr. 9, 2008-2009:cf. Boks 7.1., p. 128). As its predecessor, the new series is published every fourth year, the first in 2004, issued by the Bondevik II government and the second appeared in 2009, under the Stoltenberg II government (St.meld. nr 8, 2004-2005; St.meld. nr. 9, 2008-2009). The long-term perspective reports aim to present analyses: ‘...which point out the long-term challenges and the choices we are faced with, including the implications they make for the economic policy ahead’. In this respect these documents are highly relevant for ageing policy since: ‘The Perspective report emphasis how a sustainable development can be achieved, when the Norwegian welfare model is facing the challenges of the worlds environmental problems, an ageing population and increasing globalization’ (St.meld. nr. 9, 2008-2009: 8). In addition, seen from a policy ideas and framing perspective (Béland, 2005; Kingdon, 1995) these documents are important in terms of providing: ‘.. a good understanding of the framework conditions for the economic development’ and to ‘... analyse the future space of action’(St.meld. nr 8, 2004-2005: 6,7). Produced by the Ministry of Finance it also points out the strong role of this Ministry and its economists in drawing the lines between responsible and irresponsible policies and mapping the terrain where reforms should lead to. As argued by a former finance minister:

‘The national budget and the long-term program play a political- administrative role by, to a certain extent, binding the government and the state administration to follow those guidelines for economic policy that here are provided. Especially the quantification, makes it easier to control post-fact to what extent the framework of these planning documents are followed. The national budget and the Long-term program thus have a disciplining role’ (Bjerve, 1989: 13)

Finally, although the perspective reports do not provide more concrete policy recommendations, they do identify important government documents where the relevant long-term challenges are addressed. For instance the Stoltenberg II government refers to the strategies for inclusive working life, life-long learning and the action plan against poverty as examples in addressing the ageing challenge (St.meld. nr. 9, 2008-2009: 9).

³ The national long term programs were deliberated in the OEEC, the forerunner of the OECD. Long-term trend prognosis started early in Norway, among other areas within analysis of public finances and their sustainability. From 1962 a new planning division within the Ministry of finance started to provide so-called perspective programs for longer terms (Bjerve, 1989: 120) . The last Long-term program (*Langtidsprogrammet*) was issued in 2001.

The framing of the challenges of ageing and space for action for developing the welfare society is described as follows in the first Perspektivmeldingen from the Bondevik II government:

‘Changes in the age composition leads to an increase in costs connected to established welfare schemes which is substantially higher than tax revenues, even without improvements in the welfare arrangements. This places the public sector and economic policy against substantial challenges. The weakening of public finances can not be met with major tax increases, without substantial risk of negative influence on the tax base. Whereas increased taxation on labour may reduce the supply of labour, increasing taxes on capital income may reduce the tax base, by making it less profitable to invest in Norway. The connection between tax rates and tax basis have probably become stronger through the internationalization of the economy’, Auth. Trans.(St.meld. nr 8, 2004-2005: 10-11).

The report also discusses the productivity aspect related to the increasing role of service production in the economy, and especially within the public sector of welfare and educational services: ‘In line with previous discussions there is reason to believe that the potential for productivity improvements within education, health- and care services etc. are substantially smaller than within the general economy’ (op.cit: 92). The above problem description combines arguments and descriptions known from the academic welfare state literature, i.e. the permanent austerity perspective on welfare reforms, including demographic pressures and from the globalization debate, in terms of the tax competition view (Eklund, 1997; Iversen & Wren, 1998; Pierson, 1998; Tanzi, 1994). These perspectives provide the basic economic justification for the needed policy measures to secure future sustainability of an ageing welfare society. This macro-economic problem translates into several sub-problems of specific sectors, the most important challenges being the need to adjust the pension system to demographic changes, reduce and curb labour market exclusion, and to recruit workers to the elderly care and health sector.

Within this paradigm the measures to confront the challenge come naturally: It is basically a strategy of working more and longer, including programmatic ideas of changing incentives of the tax and pension system in order to improve the economic advantage for the individual to increase labour supply; incentive changes in sickness and disability schemes to improve work participation are other measures. In addition, the pressure on public finances provides justification for the need to modernize the public sector, by increasing efficiency, for instance through increased competition in delivering services.

Political Streams, Agendas and Alternatives: The Nordic Model, Dynamic Tax Policy and Individual Choice

The Long- term perspective for the Norwegian Economy has been examined and discussed by the Finance committee of the parliament (Storting). The committee then issues a report to the Storting (Innst. S) including differences of opinions and statements from varying party minorities and majorities. In the 2005 report to the parliament (Innst. S. nr.139, 2004-2005), the opposition parties (Labour, Centre Party and Socialist Left Party) gathers around the 'Nordic model' as a key concept. They argue that this model builds on comprehensive and universal welfare arrangements, a close cooperation between the parties of working life and a competitive private sector, which does well in international comparisons. Since this model has been successful and provided a high level of welfare, high productivity and relative low unemployment levels, a continuance of this model is the best way to meet the long term challenges, including that of demographic ageing. This implies to create a situation where all can participate actively in the production of value, and avoid the situation that is warned against in the report, of severely under-financing of the community tasks. At the same time this is a fair, secure and productive society. In order to improve participation from groups with lower labour market participation rates, such as immigrants and older people, a stronger investment in an inclusive working life and a good senior policy will be decisive to mobilise these resources in a future characterised by a lack of labour power (op.cit. p.3). As part of the Nordic model perspective, there is an explicit and important argumentation on tax level and economic growth:

'International comparison reveals that countries with a relative high level of taxation and good and comprehensive welfare arrangements are doing it very well, in relation to productivity, growth, and employment. Therefore there are no contradiction of having a relatively high tax level on the one side and growth and wealth on the other ' (op.cit. p.4, auth. Trans.).

In discussing the long term challenges for the welfare society, the three parties forming the then sitting government (Conservatives, Christian People's Party and the Liberal party) emphasised that a continuation of today's welfare arrangements combined with an ageing population would lead to a substantial increase in the financing need connected to the public sector over the coming decades. The parties stress the need of the pension reform and tax reform, improving education and increasing individual choice as ways to address the limits set by this challenge. They also point out the possibility of combining tax reductions and

improving welfare services at the same time. Additionally there is a large potential for improving efficiency of public sector, also by exposing the sector for more competition, according to these parties.

The opposition parties (A, Sp, and SV) make a clear ideological statement concerning the importance of keeping welfare arrangements organised as a public responsibility. The argument is that if the share of public financing is substantial within services, competition will not function well as a way to improve efficiency. For central welfare arrangements such as health and care, the development of private markets will undermine the possibility for redistribution and to ensure everyone equal access to basic services (op.cit. p. 15). These parties warn against relying too much on economic incentives in order to increase labour market participation. The Progress Party is worried about the continuous reduction of working time over the last decades, and the need for a policy that stimulates work, for instance through a policy towards seniors. The party warns against the consequences of increasing taxation to finance future cost of ageing:

‘The effective tax on marginal work effort is very high in Norway. This is due to both personal taxation, employer contributions and indirect taxes on consumption that the work income finances. Since future tax revenues, mainly must come from wage income, a tax increase to meet the financing need, will lead to a lower level of work supply, which in its turn reduce tax revenue, and so tax rates must be increased and so on. Our country is not served well by such a vicious circle’ (op.cit p.17, auth, trans.).

The party is also critical to the fact that 10 % of the active population draws a disability pension in Norway. They see a great potential for improving and tightening the regulations of disability pensions.

The parliamentary debate reflected the different views of government parties and the Progress Party one the one hand and the opposition parties on the other, and also here differences concerning tax policy, individual choice and the relative role of private and public sector in the economy were central (St.forh., 2004-2005: 1849-1870). The parliamentary election the following autumn, gave a majority to the Ap, SV and Sp, which formed a new red-green coalition government. Four years later they published the second long-term perspectives report. The basic structure of the report resembled that of the previous government, both reports had chapters on important international development traits, forces of the development of the economy and income, forces of development of public sector expenditures, etc. The 2009 report has an own chapter on sustainable development (environment and climate change) and one on income differences in Norway. In describing

the challenges of and response to ageing these are similar to that found in the previous report: “an ageing population is a major concern for public finances. The Government considers that a key response to these challenges is to stimulate high labour force participation by focusing on an activation approach in welfare policy and by pursuing a proactive labour market policy” (English summary, p. 13). The report also stresses the limited room for tax increases as a way of meeting the financial challenges of an ageing population. But there are important differences between the two reports, in that the latter argues strongly in favour of the Nordic model and the need to base future solutions on that model (St.meld. nr. 9, 2008-2009: cfr. especially p. 177-178). In the previous report the Nordic Model perspective was not applied.

The report to the parliament and the parliamentary discussion did not bring in additional arguments as compared to the previous report and discussions (Innst. S. nr.219, 2008-2009; St.forh., 2008-2009: 3009-3031).

Summing up the Norwegian case the problem and policy solutions streams of ageing are concentrated on its economic and financial dimension, i.e. how to finance future costs of ageing, particularly within pensions, health and elderly care. A strong and long tradition of long-term economic planning has facilitated this economic paradigm of financial sustainability. This has also implied that ageing policy has been subsumed under a more general paradigm of welfare state sustainability, wherein policy solutions are situated in pension reforms and the labour market. The political stream involves a division between the government parties and the opposition concerning the Nordic model and the question of dynamic tax policy. Whereas the Labour party representative argues in defence of the Nordic model and the need to stimulate work activity in order to provide the financial basis for future welfare arrangements, H and FRP, argued in favour of tax reductions as the way to stimulate growth and thereby meeting the challenges of ageing. These parties and especially the FRP criticises the description of the Nordic model and instead apply the concept of a ‘2/3 society’ where the last one- third are permanently outside working life.

Searching for aging policy in the UK

British politics are often portrayed as homogenous and stable. During the last decades a long period of Conservative government (1979-1997) was from 1997 replaced by a 13 years period of “New Labour” government. The question of continuity and change in British politics has to consider the last decades of the dominant two parties’ system in addition to the lack of corporative collaboration in policy formation. By the stirring exception from the 2010 election, the UK “first past the post” electoral system has traditionally leaded to a single party

majority in the House of Commons. This means fewer veto points along the decision making chain and expectations for shifts in policy by new Governments in office. However the impression given is that many Conservative policies remain in effect even after these years of Labour in office (Peters & Garman, 2007). In the area of aging policy and implementation of the paradigm of “active aging” we identify a broad based and coordinated policy approach in line with the UK institutional landscape. However, according to our theoretical approach, the specific UK way of reforming older people policy is not expected to be fully explained by institutional factors. The diffusion of ideas and policy solutions across countries has to be taken into consideration as well (Ervik, Helgøy and Christensen 2008). How different countries meet the pressures for reforming pension systems as an answer to aging societies and the global financial crisis has to do with institutional legacies but are also attributed to the new consensus among epistemic communities on neo-liberal economies (Cerami, 2010).

Due to our time scope of analysis the New Labour Government has been the dominant actor in formulating ageing policy. The presented analysis is based on the Labours manifestos and the relevant policy documents produced by the Government concerning aging policies from the 2000. We intend to analyse how the heritage from former policies as well as “new” pressures and consensuses interact in policy formulation.

The UK problem stream of the aging society

Exploring how the Government conceives the implications of the aging society is not a one-dimensional task. *First*, we identify an “older people” policy rooted in a wide range of challenges facing the growing older population’s future welfare needs. Here, the policy problem is explained from an *individualistic perspective*. What kind of service will people living longer need, who shall offer the different services and how shall it be organised are the main questions raised. *Second*, we observe a *socio-economical perspective* on demographic ageing. Although, the increase in life expectancy in several policy documents is set out as one of the most positive benefits of the economic growth and scientific development, the main and underlying element in the problem stream is the negative economical implications of an aging population expected to affect most of the societal sectors. As stated in the 2003 Report *Aspects of the Economics of an Ageing Population* from the Select Committee on Economic Affairs,

“The ageing of the population has enormous economic implications; indeed, it has the potential to have an impact on all sectors of the economy and all aspects of economic activity” (House of Lords, 2003.: 7).

As is set out in the report from the Select Committee the principle of generational fairness is a part of the UK fiscal framework: sustainable public finances are a prerequisite to achieving high and stable rates of long-term economic growth but it is also important to ensure that spending and taxation impact fairly between generations:

“current spending should be financed by current taxes (and not by future generations) over the economic cycle, thus ensuring generational fairness and fiscal sustainability. In addition, the sustainable investment rule ensures debt sustainability and also supports generational fairness by limiting the scope for the current generation to leave excessive debt burdens to future generations” (ibid p.7) .

The important value of intergenerational justice is interwoven and furthered in the Governments report on response to the Select Committee on Economic Affairs (2nd Report of session 2003-04, HL Paper 129) underlines the point of including all to take part in the rising national prosperity:

“In addressing the demographic challenges of an aging population the Government has sought to develop a balanced strategy that ensures today’s and tomorrow’s pensioners are able to share in the rising national prosperity and enjoy economic security in retirement, without placing an unsustainable burden on future generations” (Select Committee on Economic Affairs, 2004: 5).

This builds on the argument that a growing aging population will have profound effects over the coming decades, especially on the demand for health care. The 2009 long-term public finance report points to the direct pressure on the public finances through age-related expenditures, like state pension or health care, as well as indirectly, due to the relative size of the workforce and economic growth.

In addition to the general paradigm of economic sustainability and a paradigm of intergenerational justice and fairness the problem stream encompass more sector specific problem definitions. The most obvious affected is the National Health Service which sees demographic ageing, along with technological and medical trends, as the main drivers behind an expanding NHS. The question is how the National Health Service can provide a publicly funded, comprehensive, high quality service available to all independent on their ability to pay (HM Treasury, 2002b).

Another important element in the problem definition is the issue of poverty among those standing outside the labour market and the pensioners. The exclusion from the labour market is by the Labour Government identified as an individual problem focusing on the supply side of the labour in order to enable the older worker by economical incentives or training measures to choose work before retirement. The problem definition also includes an opinion of ineffective social services reflecting a “wrong” attitude against older people as passive excluding them from central arenas such as the labour.

Summing up, the problem stream on the ageing population is related to the societal economic consequences of the growing number of people standing outside the labour market and their individual need for health and social care. The leading norm of economical sustainability has interwoven a principle of intergenerational justice. Lastly, how to develop sector specific services as the National Health System is an important question, and how to create an effective and coordinated public service promoting the “right” attitudes against older people as independent and active citizens.

The paradigm of ageing policies: The conflict between the extended need for service and the promise of cost saving

The promise of Tony Blair not to change Britain’s market economy, before Labour came in office in 1997 made major changes in welfare provision difficult. The presupposition of spending restraint was compatible with the global economy implying lower taxes and less regulation, but did not meet the needs of the increasing demands of pensions and health care for the growing aging population. The need of cost saving, on the one hand, and the economical burden of extended health and care services is an interesting starting point to explore how the policy solutions have been framed in order to justify and legitimate the policy.

In the 1997 manifesto “New Labour because Britain deserves better”, education is the number one priority (Labour Party, 1997). Still, policy for older citizens is identified as important first and foremost framed within, and linked to *the pensioners’ poverty problem*. The process of building a more secure pension system on the foundation of the basic state pension was started. Labour proposes a partnership between public and private provision based in both tax and invested savings. The promises are that the basic state pension will be increased and retained as the foundation of pension provision. From 2003 the basic state pension was further increased and the Minimum Income Guarantee is up rated each year in

line with earnings. A more small scale policies are introduced as pensioners are offered Winter Fuel Payment, reduced taxes, free TV licences, free bus travels etc.

The problems definition of an extended and more effective *health care* system in accordance with the Labour's National Health System Plan is concretized to a policy solution intending to offer a certain amount, £1.4 billion, of investment for older people. Better health, independence and dignity are the underlying motivations for the health reform. In general terms a modern system of community care is introduced. Several policy documents, i.e. the 2006 White Paper "Our Health, Our Care, Our Say", follows up the promise from 1997 which integrate a "third age service" of coordinating health, housing, benefits and social care (Ministry of Health and Social Affairs, 2006.).

A strategy to prolong working careers is presented as a solution to the growing "passive" population. Here the statement is "*Older people, with a wealth of talent and experience, are a resource we cannot afford to waste*" (Labour Party, 2001: 38). In order to help people into work a principle of "employment first" are introduced. A new type of "contract" thinking shall balance the rights and responsibilities at every stage founded on the "something for something" principle. The Job service system is re-created, called the Jobcentre Plus, and the New Deal 50+ program is introduced focusing on numeracy, literacy, IT skills and presentation. To increase the amount of people between 50 and state pension age in work, ways to mix occupational pension and part time work from now is being examined.

These election promises and suggestions are part of the first main strategy of ageing policy from 2000, when The Performance and Innovation Unit (PIU) formulated the "*Winning the generation game. Improving opportunities for people aged 50-65 years in work and community activity*". (Ervik et al., 2008; Performance and Innovation Unit, 2000: 7).

In the following manifesto, The Labour Party manifesto 2005 "*Britain forward not back*", one out of nine chapters is dedicated to older people, "*Older people: secure today, prepared for the future. Forward to new opportunities in old age, not back to poverty and insecurity*" (Labour Party, 2005) While the preceding older people policy has concentrated on pensioner poverty this manifesto highlight the priority to build a national consensus for a long-term settlement for pensions. Security and decency for all, encouraging and rewarding savings and financial sustainability is the basis for seeking national consensus for a long-term reform. A Pensions Commission was appointed. All employees over 65 will have the right to request of their employer to continue working. There will be a review after five years on whether there should be any fixed retirement ages. Greater choice in an integrated care system is still an important Labour issue.

Age discrimination in the work place, as well as outside the workplace as in insurance is outlawed and the Equality Bill make it possible to require individualised and need based public services, regardless of their age.

These measures represent a shift from poverty reduction to a more work oriented policy, supported by a service system based on independence and choice:

(...) to rethink policies and approaches to public services, in order to foster true independence and choice for older citizens and help them improve their quality of life. For that to happen we must explode the myth that ageing is a barrier to a positive contribution to the economy and society, through work and through active engagement in the community” (Department for Work and Pensions, 2004: Prime Minister’s foreword).

Because the workforce is changing a new thinking about job design, recruitment and employer responsibilities is seen as necessary. However, the employers are not imposed any formal instructions.

The implementation of the Opportunity Age strategy is continually evaluated and in 2009 the implementation report from Department for Work and Pensions concluded that the majority of the commitments have been delivered (Department for Work and Pensions, 2009), including introduction of age discrimination legislation in employment and training in 2006 and from 2009 in Public Duty and Goods, Facilities and Services (Equalities Bill). The workline is strengthened as the Incapacity Benefit and the Employment and Support Allowance both demanding work like activities. In addition Train to Gain is introduced which represents a range of measures to improve work incentives. Furthering the 2005 Opportunity Age strategy (Department of Work and Pensions, 2005), the *Building a Society for All Ages* strategy was launched in 2009 (Department for Work and Pensions, Department for Health and Social Security, & Department for Communities and Local Government, 2009). This is a cross governmental strategy involving the Department for Work and Pensions, Department of Health and Secretary of State, Communities and Local Government. The ideal of individual choice (and responsibility) is here even more prominent along with the work orientation. Furthering the already established policy, there is not suggested new policy tools due to this strategy. Gordon Brown set the stage in the Prime Minister’s foreword by stating that:

“...prolonged working careers could be a big factor in the success of Britain’s businesses and our future economic growth. As a country we must make the most of the talents of all our people, whatever their age, if we are to secure a successful economic future”.

Summing up, we observe a range of policy solutions recommended by The Labour Party which have been in office for the whole period when the challenge of demographic aging has been a relevant political issue. The solutions concentrates on the problem stream issues defined by the Labour Party and is thereby rooted in a policy paradigm constituting “road-maps”. Hence, the cost saving element is underlying the solutions, although the recreation of pension system, reduction of the poverty problem and the improvement of the health and care services may contradict this element. In general, ageing policy is based on two different ideologies, the supply side, work oriented policy is based on a liberal market economy on the one hand, and the more comprehensive tradition of state funded programs such as National Health System. Thus the arguments have elements of both the liberal economy and a more comprehensive, social democratic ideology of equality and universalism.

The Political stream of “traditionally modern”

The pressure on welfare provision caused by rising unemployment and an increasing aging population from the 1970s lead to a re-direction of the welfare state in UK. The post war period of consensus on welfare policies dismantled and while the Conservatives turned to the “new right “ the Labour responded by turning to “new left” (Bochel & Defty, 2007). From 1979 until 1997 successive Conservative governments introduced market-based and supply-side policy, i.e. labour market deregulation, relaxing laws regulating employment and wages, reducing levels of social security benefits, and introduced incentives to stay in work instead of receiving ‘passive’ benefits (Ervik, Helgøy and Christensen 2008). The consequences for older people policy were a reduced protection in labour in addition to reduced unemployed benefits. The privatisation of pensions through the 1986 reform, introducing personal pensions and opting out from the state earnings related pension scheme, resulted in a less adequate income in old age.

When New Labour came into office from 1997, much of the new right policies were furthered. Moreover, in accordance with few veto points in the majority political system, there is a direct link between the Labours manifesto and the policy formulations and arguments as they appear in the policy documents and aging policy programs presented above. To illustrate, the foreword by Prime Minister Gordon Brown in the Opportunity Age strategy is pasted word by word from the last Labour Party Manifesto “ .. *we need to make changes to ensure that we have choices about how we want to live as we grow older – choices about how much*

to work, how to access the healthcare that will keep us fit for longer, how best to stay engaged with our communities." (www.labour.org.uk/policies/older-people).

Along with a continuation of the Conservatives' policies, traditional Labours' comprehensive values were re-introduced as a response to the growing aging population. The two different, and partly contradictory directions, are reflected in the deregulated labour market policy and supply-side oriented policy on the one hand, and the growing public spending on health and care policy on the other hand. The focus is on the strengthening of the employability of individuals, lacking to a huge extent policies to stimulate the demand side of the economy through employment strategies. Within these low cost state policies, employer's policies are mainly left to voluntary action. The New Deal 50 + program heavily relies on the measures of information and consultation strategies in addition to financial support so that the individual itself will acquire relevant qualification to get a job, and turn away from passive benefits. On the other hand, the ageing policy in UK is an example of a broad based policy involving cross-sector actors and increased public spending. Several of the strategies are a consequence of inter-ministerial groups working out measures and including different partners collaborating. Both the 2000 "Winning the generation game" and the 2009 "Building a society for all ages" is examples of collaboration between the department for Work and Pension, the department for Health, and Communities and Local Government. The 2009 Public Service Agreement (PSA 17) "Tackle Poverty and promote greater independence and wellbeing in Later life" was worked out between these three bodies as well (HM Government, 2010). The older people policies are linked to poverty policy, to pension policy and to health and care policy. The health policy in UK is an example of a comprehensive welfare area steered and regulated by a strong state. Although, Britain from the 1970s has suffered from a scarce public sector economy, the state responsibility has remained through a comprehensive National Health System. Trends of decentralisation and local autonomy, in order to reduce the costs, have not changed the states' responsibility for the health care system. The NHS in UK is untypically for a liberal welfare model due to its funding basis, as it is almost entirely tax funded. This means that the UK's most essential welfare service is more in line with social democratic welfare regimes such as the Scandinavian countries (Bamra, 2009).

While the Norwegian coordinated market economy promotes long-term perspectives and investments, the UK liberal market economy has a short time perspective. Investments in prevention and well being at the work place fit better with the Norwegian than the UK economy (Ervik et.al 2008). However, we observe a long term outlook within the health care system in UK. A Royal Commission was established in 1998 in order to work out a fair

system for funding long-term care for elderly ,(www.royal-commission-elderly.gov.uk/refs.htm). In addition in 1999 a long-term care charter "*Better Care – Higher Standards*" defining standards of services to expect from health, housing and social services was introduced (Department for Health, 1999). There has also been established long term planning to address the challenges of funding due to demographic changes. Since 2002 HM Treasury has been publishing a *Long-term Public Finance Report*, providing an assessment of the long-term sustainability of the public finances (HM Treasury, 2002a). As one representative from UK Treasury points out the long-term reports shall help ensure the Government's objective "to build a strong economy and a fair society, in which there is opportunity and security for all" (Eich, 2009: 688). The reason behind the long term reports was to meet the domestic policy developments. In addition it must be seen as a response to increased interest in long-term public finance issues on the international level (OECD and European Commission). The 2003 "*Long-term public finance report: fiscal sustainability with an ageing population*" is specifically oriented on challenges with an ageing population (HM Treasury, 2003). These examples of long-term focuses in the policy-making process can be seen as contradictory to the short time perspective associated with a liberal economy. It reflects the two sided ideology which the Labour policy relies on, and thereby the tensions between two ideologies the political argumentation has to tackle in order to legitimate and gain societal support for an older people policy.

Summary and Concluding Discussion

In this paper we have presented how policies are delimited and justified in Norway and the UK. In this last section we will summarise the two cases in order to answer how the agenda of ageing policies is constructed by the different actors and how the agenda is decided by the politics of ageing.

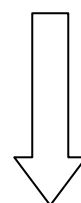
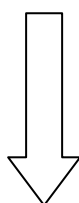
The figure below sums up the Norwegian case by contrasting the different frames, pointing out major areas of conflict and consensus. We apply a distinction between paradigmatic ideas, which combines cognitive and normative ideas about the functioning of economy and society and basic ideas of fairness. Programmatic ideas are more policy specific ideas of addressing certain problems.

Figure 1: The Ageing challenge and major political parties in Norway: Conflicting and consensual policy frames

Basic Paradigmatic ideas: a blend of cognitive and normative ideas

‘The Nordic Model’
 (‘The Norwegian model’)
 Labour (red-green coalition)

A limited state, people not models, 2/3 society, dynamic tax policy
 Conservatives/Progress Party



Programmatic ideas

Conflict

Tax reductions will undermine WS financing
 Pension reform: sufficient as long as working longer succeeds
 Elderly care: A layer of private market based care services enhances inequalities and threatens to undermine the solidarity needed to finance public universal elderly care services

Consensus

Programmatic ideas of the Working longer paradigm: Incentives in pensions system and other social security arrangements constructed so as to make work the natural choice,
 Inclusive work agreement and Senior policy,
 A basically positive view of elderly /ageing people as resourceful and needed

Conflict

Tax reductions stimulates work and economy and so does not undermine WS financing
 Pensions: Pension reform not sufficient, need to replace PAYG system for supplementary pensions with fund based system (H). FRP against pension reform, defending present pre-reform system with modifications
 Elderly care: Increase competition from private market actors to improve quality of care and consumer choice, building a private market for additional care services

Sources: (Arbeiderpartiet (Labour Party), 2005, 2009, 2010; Fremskrittspartiet (Progress Party), 1981, 1985, 1993, 2005, 2009; Høyre (Conservative Party), 1981, 1985, 1993, 2001, 2009; Innst. S. nr.139, 2004-2005; Innst. S. nr.219, 2008-2009; Johansen, 2009; St.forh., 2004-2005, 2008-2009).

The figure illustrates firstly, that the political parties apply different overall ideological paradigms in communicating how to address the ageing challenge. The Labour Party roots their solutions firmly in the continuation of the Nordic model, and by putting this model on the agenda and investing strong adherence to this concept, the opposition parties apply an alternative ideological framework and rhetorical approach, emphasising a limited state, individual choice, and the positive economic effects of tax reductions. In short: ‘Society is in constant change and development. Therefore the aim of politics is to take care of people, not systems. The ideology of the Conservative Party is not connected to a societal model, but to principles and values’ (our trans.) (Høyre (Conservative Party), 2008). The point here is not to argue that for instance the Conservative Party is against the Nordic or Norwegian Model. As argued in one of our interviews: ‘there is consensus about the Norwegian model. When I speak of the Norwegian model I mean more the ability to make changes, this is what has represented the Norwegian model at its best’ (our trans.) (Interview No. 2 Norway, 2010).

Secondly, moving to programmatic ideas we observe a broad consensus on the working longer strategy, and the recent pension reform is supported by both Labour and the Conservative Party. These are key areas where ageing policies are being implemented at present and so underscores the reality of a broad consensus at the practical level of ageing policy. Still and thirdly, there are also important points of more conflicting paradigmatic and programmatic ideas around taxation, the future public- private mix in elderly care, and on the need for further pension reforms. Adding these issues together may point to a future with an expanding area of political conflict within ageing policy.

While the Norwegian debate on the challenge of demographic ageing has concentrated on the overall ideology of the welfare state model, there has not been the same overall discussion and conflicts on the ideology in the UK. Summing up the UK case, the construction of policy problems and the policy solutions is frequently related to long term institutional legacies of a liberal market based model. Thus the established paradigmatic ideas of less state and regulation, low public spending and market based solution were continued when New Labour came in office in 1997. The active and demand oriented labour market policy which is the cornerstone in the Nordic model, is absent in UK where employee protection is scarce and employers individual responsibility is voluntary. We do, however, identify some contradictions within the last decade’s paradigmatic ideas concerning how to meet the demographic ageing. The growing older population is seen as the most important driving force to the expanding spending of the National Health System. This important part of the welfare system is fully public financed and state administered, in contrast to a neo-liberal

welfare model and in accordance with a social-democratic model. Ageing policy in UK is constructed within the tension of market and state based system.

The programmatic ideas as defined by Labour during various party manifestos the last twelve years form a specific policy area of “older people policy”. Older people policy is first and foremost concerned with pension policy, health and social care policies and anti-discrimination in working life and public services. The policies are framed within a desirable state of old age characterised by *independence, dignity, security* and *activity*. An important goal is to claim for justice for the poorest part of the group of older people. There seems to be an interconnection between the different policy fields, in the sense that they build upon each other in order to reach these four basic values. Typically, the aging policy is limited to policies embracing the targeted group of older people, underlined by label the policies consequently as “older people policy”. There are minor indications of a life-course perspective, although some reforms and programs are intended to apply to other groups, as for example younger people, as well. However, during the twelve years of Labour in office there seems to be a shift from the intention of fighting poverty among older people to a more work oriented perspective. Participation in working life is seen as an important mean to overcome the societal burden of a growing aging population and their need for care, as well as leading to a better quality of life, and a more meaningful life for every older person. This shift is at the same time an indicator of the two folded ideology which the Labour Party is promoting. The liberal market and cost saving orientation is mixed together with the universalistic social democratic model represented by the NHS. Thus, the UK ageing policy is, despite the one party system model, fragmented consisting of contradictory elements of huge state health budgets and incentive based individual supply oriented labour market policies. In order to sell this fragmented policy there is need to apply both the logic of individual responsibility and independence and state responsibility for the growing populations health and security.

In searching for similarities and dissimilarities between the two countries we observe that both countries have implemented policy to meet the demographic aging in line with institutional legacies. In Norway aging policy is not a specific and clearly defined area but to a high degree integrated in the general Nordic model of tax funded universalistic welfare policy. There is a lack of targeted policy towards older people as a group. Active labour market policy and the work line permeate the policy solutions. The strong tradition of economic long-term planning in Norway has been instrumental in forging together problem and policy solutions streams into a coherent paradigm of financial sustainability, where working longer policies emerge as the key response to the permanent austerity phenomenon

of the welfare state. The UK ageing policy is formulated in line with a market based neo liberalist model. There is formulated a targeted “older people policy”, although low cost policy, based on voluntarism and individual choice. On the other hand, the two countries do introduce policies and ideas in contrast to the institutional legacies. Norwegian ageing policy is to some degree influenced by market solutions in the health care system, while the UK has developed an even more universalistic and state regulated health care system than Norway. Furthermore, the UK has introduced a stronger work line and introduced an increased basic state pension while the Norwegians’ pension reform imply a more contribution-based system and put a stronger reliance on occupational pensions. This implies that politics to some degree decide policy. However, both countries have introduced policies contrary to their institutional legacies. We observe a division and non-coherence between the paradigmatic ideas (ideology) and the programmatic practical policy orientation. In Norway, this is connected to the coalition and the partners’ collaboration in policy making. In the case of UK, the stronger challenge from demographic ageing and growing inequalities and poverty has called for state responsibility and political pragmatism.

In the introduction of our paper we addressed the question of whether the current financial and real economy crises would have an impact on ageing policy. The importance of this is obvious: If older workers (and other groups in society) are increasingly affected by unemployment and lower activity rates, this could have negative individual consequences in terms of well-being and economic security. But it could also jeopardize the basic legitimacy of the working longer paradigm, which presumes that there is and will be a basic scarcity of labour. Asking policy actors in Norway about how the financial crisis have impacted ageing policy measures, a majority did not think that they had changed policies as a response to the economic crisis or that there was a need to rethink existing policy instruments. One reason for this is of course the fortunate position of the Norwegian economy, which has spared the country for dramatic cuts in public expenditures to reduce budget and debt deficit, as compared to other countries. The crisis impact is greater in the UK case. Unemployment among older workers is rising at double the rate of the general workforce (Sargeant & Frazer, 2010). According to Age UK 100 000 people were forced to retire in a single year, the shrinking of the economy, caused a 1,5 % increase in public spending on health, care and pensions, from 2008 to 2009. This increase represented the same as ten years of demographic change would do. In addition, both income and health inequalities have been widening over the last years (Age UK, 2010). Since the incoming government is determined to reduce deficits by cutting public spending and increasing taxes, the idea of seeing ‘government as

employer of last resort' (Atkinson, 2008), seems to be far off the policy agenda at present. As a policy measure it would have represented a type of demand oriented Keynesian element in an otherwise supply –side dominated range of ageing policy instruments. Instead the imperatives of economic deficit reduction, turn its confidence to economic growth and employment security in the private sector.

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(To be completed)

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