

Guide for Civil Dialogue on Promoting Older People's Social Inclusion

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Table of content

1	Foreword
1	Context
2	Definition of Civil Dialogue
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2	I. Good practices of civil dialogue with regard to ageing
3	Civil dialogue involving older people and their organisations
7	Civil dialogue to promote social inclusion in old age
8	Other initiatives for civil dialogue promoted by third sector organisations
9	General legal provisions to support civil society and civil dialogue
10	Civil dialogue across all levels of governance
<hr/>	
12	II. Involvement of older people's organisations in civil dialogue
12	What are the benefits of participation in civil dialogue?
13	What are the barriers and challenges to getting involved?
15	What are the factors for successful involvement?
<hr/>	
16	III. Recommendations to strengthen civil dialogue
17	Tasks for older people's organisations
19	Tasks for public authorities
<hr/>	
20	Conclusions

Foreword

In the framework of the INCLUSage project, older people's organisations from Bulgaria, Czech Republic, Finland, Germany, Italy, Poland and Slovakia and members of AGE Platform Europe developed this Guide for Civil Dialogue on Promoting Older People's Social Inclusion (from now onwards referred to as the Guide).

The intention of the Guide is to present some good practice examples of civil dialogue on ageing issues including those that promote social inclusion in old age. The Guide also makes some proposals on how best to implement and participate in the civil dialogue process across all national policy-making levels: from governmental level down through to regional and local level strategies and initiatives which aim to improve the daily lives of older people.

The Guide also includes some specific recommendations. Firstly, on how older people's organisations can empower older people to take an active role in policy debates and how they can participate successfully in policy-making processes and, secondly, on how public authorities should support older people and their organisations in order to implement a sustainable civil dialogue on policy-making with regard to ageing issues.

We hope that the Guide will be used by both older people's organisations and public authorities at all levels in order to facilitate a broad dialogue between relevant stakeholders. The ultimate objective is to enhance national debates on promoting and ensuring well-being and dignity in old age.

Context

It is commonly recognised that a growing number of citizens feel excluded from mainstream politics and societal debates and that representative democracy fails to address people's concerns and meet their needs. At the same time, civil society has been constantly growing and is today widely represented by non-governmental organisations and community-based groups. These various civil society representatives constitute a new and fundamental part of democracy and enable citizens to express views about societal issues and influence decision-making processes at all levels.

Self-advocacy organisations representing older people also tend to be actively involved in policy development processes in order to express concerns and issues affecting older people. The direct voice of ordinary older people is more than ever necessary in this time of accelerated population ageing and the deterioration of the overall social context due to the crisis. A broad civil dialogue between citizens of all ages, public authorities and relevant stakeholders – whose decisions impact on people's daily lives – will be crucial in order to respond to demographic change.

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Definition of Civil Dialogue

There is no common definition of civil dialogue. It is neither a parallel nor complementary concept to the social dialogue. Civil dialogue has a generic nature and refers to public policy at large whilst social dialogue embraces the specific macro-economic sphere and is structured around clear objectives and standard actors – public authorities, employers and workers.

Civil dialogue is more diverse and inclusive but also less structured. Its relations between public authorities and civil society may be conducted through many channels, on the initiative of either side, and through such means as one-to-one meetings, hearings, conferences, written consultation procedures etc. It is mainly within the EU context that these structures of civil dialogue are being developed and promoted as a way of bridging the gap between the EU, its institutions and citizens.

Civil dialogue is a formal discussion on an issue where two or more parties express opposing views and then look for a consensus that can satisfy their respective positions. Civil dialogue can be therefore described as:

- Interaction between public institutions and civil society organisations – rather than unilateral exchange;

- Covering different forms of civil society participation – from simple dissemination of information, consultation processes to active involvement in decision-making;
- Taking place alongside the whole policy-making process: development of framework, definition of policy objectives, implementation, monitoring, evaluation and follow-up.

I. Good practices of civil dialogue with regard to ageing

The diversity of political, economic, institutional, legal and cultural contexts across the studied seven EU Member States explains the variety of approaches in organising, developing and implementing civil dialogue on ageing and older people's social inclusion. The following examples are neither exhaustive nor fully illustrative of how civil dialogue on ageing is or how it should be organised, facilitated and promoted. Instead, these examples provide an insight into the various initiatives from seven partner countries which promote the voice and/or facilitate the role of ordinary older people in decision and policy-making processes.

However, the country sample of the INCLUSage project – representing both western European democracies with a strong civil society sector and the former eastern-bloc countries still in the phase of consolidating their political, institutional and civic structures – makes cross-country comparison very difficult, if not impossible. Moreover, the studied countries present different modes of political organization including centralised and federal structures. Nevertheless, one of the key conclusions of our analysis is that irrespective of the national context, civil dialogue remains a relatively vague concept in all countries and there is a general resistance among policy-makers at all levels to share the decision-making process with ordinary citizens and their representatives. Not surprisingly, it is even more difficult for older people's organisations to engage in debating social inclusion policy e.g. with regard to well-being and dignity in old age.

The examples from the seven partner countries present various existing or planned forms of civil dialogue co-operation at national, regional and local levels. These include both legal-based and informal initiatives and refer to either the general policy-making process or to those specifically concerned with ageing and older people. We also present some examples of how older people's organisations themselves promote dialogue with institutional stakeholders and how they involve older people in this exercise. These 'bottom-up' initiatives demonstrate that in the absence of formal structures for civil dialogue, older people's organisations can mobilise their own resources, knowledge and experience in order to take part in policy-making and formulate concrete proposals for policy development. Indeed, the self-determination of many older people's organisations substitutes for the lack of durable structures of civil dialogue proposed by national governments and local authorities.

Civil dialogue involving older people and their organisations

National level

National Council for Seniors and Ageing Population – Czech Republic

The Czech Government established in 2006 a permanent advisory body where 28 representatives from different older people's organisations and civil servants from various ministries have a regular exchange on ageing-related issues. The overall objective of this Council is to create an age-friendly environment which promotes healthy, active and dignified life in old age. Additionally, the Council promotes an active involvement of older persons in the development of economic and social policy formulated in the context of demographic ageing. The Council meets at least three times a year and on a further *ad hoc* basis if necessary. It has the power to investigate citizens' complaints directly. Organisational, technical and administrative work including the dissemination of the Council's decisions and measures is provided by its secretariat which is ensured by the Ministry of Labour and Social Affairs. The Council has four working groups on: 1) health and long-term care, 2) labour market, lifelong learning and income-related social protection, 3) anti-discrimination and social participation and 4) residential housing and social services.

Ombudsman for Older People – Finland

Finnish senior organisations have been lobbying their national parliament to establish an Ombudsman for Older People (Äldreombudsman). Its role should be to ensure a permanent link between organisations representing older people and the national government in order to address any relevant issue and, if necessary, to mediate in case older people's rights are not respected. The founding principle of the Ombudsman for Older People should be the involvement of older people's organisations in its discussions.

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Older people's experience and knowledge must be used when shaping political decisions – not only with regard to topics directly related to old age but also in a wider context, for instance in relation to education, employment, services of general interest etc.

the implementation of policies which have a direct impact on older people. Their initiatives can range from organising social and cultural activities for older people, carrying out thematic debates within local communities (e.g. on solidarity among generations) to active participation in policy developments and decision-making regarding older people (e.g. on fixing energy price rates, allocation of housing benefits for the most vulnerable, adaptation of transport infrastructure for disabled people or health and long-term care provision, pension reforms). However, in most of the studied countries, neither Senior Councils nor Parliaments are compulsory which limits their effective role and actual impact on policy-making.

In **Bulgaria** there are very few participative bodies directly targeting older people. The existing public councils bring together citizens from all areas of society to create a dynamic and positive environment to facilitate their participation in policy-making. These public councils are voluntary and independent and they exist at national, regional, municipal and community level. There are currently around 60 national public councils, 40 regional level councils and over 50 municipal level councils which have been registered. The community level councils implement the widest range of initiatives. These broad civic initiatives also address the problems faced by particular population groups such as older people and they promote the active participation of citizens in the development and implementation of municipal plans, strategies and projects. For instance, a Consultative Council in the Lozentz district in Sofia, bringing together representatives from 10 civil organisations, provides expertise and advice in developing local practices and policies and seeks to encourage civil participation and strengthened dialogue between the administration and citizens. One of the annual events organised by the Council is the European Day of Solidarity between Generations. Another example is the Public Council for Older People established in the Russe municipality (chaired by the mayor) where various organisations

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Parliamentary Working Group for Older People – Poland

The Parliamentary Working Group for Older People was established in 2008 on the initiative of the Polish Senate. Its aims are to mobilise members of the National Assembly to elaborate long-term policy measures regarding older people and to mainstream the ageing dimension into all relevant policy developments, in particular national legislative proposals. In order to ensure that national and local policies take account of older people's needs, the Working Group promotes and supports the principle of participation of older people's organisations in policy debate, for instance by involving the national coordination network for senior organisations, *Forum 50+*, in its discussions. Its members have access to the Working Group's work programme and are regularly invited to participate in its meetings. The Working Group also provides a useful channel for disseminating and communicating information on older people's needs among politicians and the general public. The Working Group has recently been working on a proposal for an amendment to the National Act on Self-Government whose aim is to make it obligatory for local authorities to consult older people's organisations when preparing local policies.

Regional and local levels

The aim of the following participative bodies involving seniors at regional and local level is not only to inform and advise public authorities on ageing-related issues but also to initiate actions on behalf of and in the interests of older people's communities. Senior Parliaments, Councils, Older People's Centres etc. also play the role of 'watchdogs' whereby they monitor

working with and for older people jointly discuss possible actions.

In the **Czech Republic** older people's organisations organise the involvement of seniors in policy debate through informal and ad hoc participatory groups with the support of municipal authorities, for example in Prague. During the meetings, older people can address their requests and demands directly to invited representatives such as social services providers. These small participatory groups can also be an effective tool in mobilising older people's opinions on specific occasions, for example before a local referendum is voted on. Some other municipalities across the country also actively involve their older populations, for example the cities of Ústí nad Labem and Roudnice nad Labem involve older people in discussions on the community planning of their social services. In both these cities there are also working groups looking at care issues for older and disabled people. In Ústí nad Labem there is also a Senior Council established to help city authorities and older people's representatives are involved as advisors within the municipal health commission.

In **Finland** the municipal Senior Councils are not compulsory. However about 92 percent of senior citizens over 65 years live in a municipality with such a council. Representatives of older people's organisations are also members of the local Senior Councils. The municipality can decide how to organise those bodies. These Senior Councils are active in debating local strategies. They also take initiatives on different issues concerning older people such as infrastructure accessibility in urban planning, health care, recreational activities etc. At the same time, these Councils do not have any formal decision-making role. If it was compulsory for municipalities to set up Senior Councils, their role as a consultative body would be strengthened.

In **Germany** public participation of seniors in political decision-making is organised both at regional and local levels. There is a strong link between participatory initiatives across different levels of governance in order to ensure a more effective mechanism for citizens' involvement in policy developments. The following examples describe this multilevel structure for civil dialogue on ageing.

Memorandum for older people's involvement in policy and decision-making at local level

The Memorandum for 'Participation in shaping and decision-making: senior citizens in their local community' was issued at federal level in 2008 and aims to create a positive image of active ageing and promote a stronger participation of older men and women in policy-making. It was developed under the leadership of the BAGSO network (*Bundesarbeitsgemeinschaft der Senioren-Organisationen*) in cooperation with other older people's or third-sector organisations, federal public authorities, churches, service providers, welfare groups etc. The Memorandum provides guidelines for the federal programme on 'active ageing' and supports local authorities in developing structures for a durable participation and involvement of senior citizens in community life. Between 2008 and 2010, over 150 municipalities received 'start-up' funding (10,000 euro each) in order to identify – through debates carried out by local forums including senior organisations – the needs, opinions and requests that older people have at grass-roots level. This common reflection led to the elaboration of concrete proposals for community-level projects which were implemented in cooperation with older people. The selected projects were financed, monitored and evaluated by the Federal Research Centre for the Development of Civil Society.

Regional law on the participation of senior citizens

The 'Seniorenmitwirkungsgesetz' law, passed in 2010 and prepared in cooperation between the Ministry of Social Affairs and Health and the regional Senior Citizens' Council in the Mecklenburg-Vorpommern State (LSB MV), aims to facilitate the participation of older people in policy planning and defines the role of the LSB MV as management agency. Laws supporting regional Senior Citizens' Councils exist in other federal states e.g. in the capital-region of Berlin since 2006, or are currently being prepared e.g. in the Free State of Thuringia. All these regional councils aim to develop a culture of civil participation among senior citizens and their organisations and to eventually establish formal frameworks for the active involvement of older people in local policy-making.

Regional Senior Citizens' Council of Mecklenburg-Vorpommern

The regional Senior Citizens' Council in Mecklenburg-Vorpommern (LSB MV) supports a broader political participation of older people in all districts and cities of this rapidly ageing State. The Council involves senior citizens in policy planning at inter communal level throughout regular so-called regional forums. Furthermore, the LSB MV initiates and supports other forms of political participation among older people such as the Senior Citizens' Parliament, where requests are formulated in the form of motions addressed to policy makers. For example, convened on the initiative of the LSB MV, the 6th Senior Citizens' Parliament adopted in June 2010 a motion on 'Measures to prevent poverty in old age and secure pensions'. The Council also recently published conclusions concerning the fight against poverty in old age at all levels of policy-making.

Older people's participation at community level is organised through local Senior Councils – at present more than 1,200 such entities exist. These participatory bodies work at an *ex-ante* stage of the policy-making process before legislative proposals are tabled by the regional parliaments.

Local Senior Councils also facilitate links between older people, politicians and public administration i.e. they convey evidence-based information from the grass-roots level to decision-makers. In proximity to local social realities, the local Councils provide older people with the opportunity to address various issues that concern them directly, but also those that are relevant to other generations; thereby contributing to strengthening overall societal cohesion.

Municipal cross-sector coordination on ageing

In Germany there is also a growing trend to develop structures for ongoing cross-sector cooperation at municipal level with regard to ageing issues. For example, the Future of Older People organisation in Arnshagen links the existing structures for promoting volunteer work and participation of seniors (senior citizens councils, senior citizens offices or senior trainers) with new associative networks and professional counselling bodies. Other innovative programmes such as NAIS-New Forms of Ageing in Towns of the Bertelsmann-Foundation provide examples of new measures that aim to promote older people's participation in shaping local policy-making.

In **Italy** around 10,000 Older People's Centres exist where various social, educational, cultural and leisure activities promote links among older persons themselves and seek to empower them and involve them in community life. These local centres also provide a focal point for older people to make their voice heard on the issues that concern them. The centres are self-managed by older people and their organisations but based on common rules developed with the municipal administrations through their annual programmes i.e. financial support is provided to the centres by the municipalities. The impact of these older people's centres on policy-making is however limited due to the non-binding character of the consultation procedures. It is rather the attitude and openness of an individual municipal civil servant that can

ensure that the voice of older people is effectively heard.

As part of the institutional reforms in **Poland** after 1989, an Act on Local Self-Government was adopted with the aim to revitalise local government. According to the Act, municipal authorities have a statutory obligation to cooperate with non-governmental organisations (NGOs). In recent years, several municipal Senior Councils have been established in line with the principle of a broad citizens' participation promoted by the above Act. These Senior Councils are consultative bodies for municipal or regional authorities and are open to individuals aged over 60, civil society representatives, local civil servants and policy makers.

In **Slovakia** the involvement of older people in policy debate is to a large extent determined by the self-initiative of older individuals. Older people at local and regional level are involved through their own organisations. For instance, regular active participatory groups are organised by Fórum pre pomoc starším, a national self-advocacy senior organisation, throughout the country to discuss and monitor problems and older people's needs in their communities. This grass-roots work includes data collection through face-to-face or telephone interviews, surveys and questionnaires on issues such as elder abuse, social exclusion, isolation etc. In order to strengthen the voice of older people, the Fórum pre pomoc starším also established in 2008 its own-initiative Senior Citizens Parliament. By mobilising older people at local, regional and national levels and providing them with access to policy-makers the Parliament seeks to build a broad consensus on how best to address older people's needs and to influence relevant national policy at all levels. The Senior Citizens Parliament has recently worked on various proposals for national law which impact on older people, for example the National Act on Social Services and amendments to national law on minimum income.

Civil dialogue to promote social inclusion in old age

NGOs network working with and for older people – Bulgaria

Representatives of more than 20 civil organisations from all over the country, working with and for older people, set up an informal network to strengthen social inclusion in old age. The network is an open forum for reflection and debates around the issue of promotion of quality of life and well-being in old age. It also acts as catalyst for developing and promoting common positions and actions on behalf of older people. An important part of its activities also concerns the promotion of older people's participation in the process of policy development. The network is open to every senior organisation that is interested in sharing information and cooperating with peer organisations across the country. The aim is to strengthen civil dialogue on social inclusion in old age and to stimulate an effective and regular process of consultation with older people and their organisations. The network mutually empowers its members to participate actively in lobbying policy-makers i.e. promoting their positions and lobbying national and local authorities and institutions on these.

Social inclusion programme at local level 'Socially Integrative City' – Germany

This Federal Programme launched in 1999 is an innovative small-scale initiative that takes a participatory decision-making approach to urban development at local level. The programme seeks to foster the active participation of people confronted with poverty and social exclusion, together with their representative organisations, by allowing their direct contribution into decision-making. The initiative also promotes cooperation among all relevant stakeholders at local level. For instance, the programme has recently funded projects which stress the importance of setting and empowering older migrant communities.

They ask in particular to be part of society involving other age and population groups. In response, the Socially Integrative City programme focuses on promoting social cohesion in the local context and seeks to meet the very specific needs that may exist among older migrants in the broader local community.

Ombudsman's Strategy for Combating Poverty – Poland

The Polish Ombudsman is a government body which represents the interests of the public by investigating and addressing complaints reported by individual citizens. It also plays an important role in defending and raising awareness of older people's rights. These initiatives are usually prepared in consultation with older people's organisations. Although not directly involved in national policy-making on social inclusion, the Ombudsman Office prepares an own-initiative Strategy for Combating Poverty in Poland. Since 2008, it has incorporated a thematic focus on older people's issues into this strategy and the main Polish older people's organisations participate in the preparatory work to formulate it i.e. through a one-day convention organised annually in October which is devoted to analysing poverty risk.

Other initiatives for civil dialogue promoted by third sector organisations

Civil Participation Forum – Bulgaria

The Civil Participation Forum is an independent and informal platform of non-governmental organisations which aims to influence government policy. The day-to-day work of the Forum, which brings together over 80 members, is organised through various working groups and a general assembly. Members of the Forum join their forces and capacities to promote an ongoing and regular civil participation in decision-making processes at local, regional and national level. The Forum also acts as a watchdog and puts pressure on government authorities to involve citizens in the development and implementation

of its policies. In this respect, members lobby for clear legal provisions regulating civil participation in decision-making process at all levels. They also seek to establish partnerships and cooperation with government authorities which respect and apply mechanisms for accountable and transparent policy-making including dialogue with citizens.

Thematic Discussion Platforms – Finland

Finnish national organisations representing senior citizens form a national informal network called the EETU/PIO. This network enables its members to organise thematic discussion platforms on various topics related to ageing. The outcomes of these common reflection exercises can range from issuing motions, publishing reactions to current policy developments, commenting on measures affecting older people, preparing common positions on a specific subject and submitting own-initiative requests for legislative initiatives. There are also plans to develop a framework for an ongoing cooperation between non-governmental organisations across all sectors and the ministerial, parliamentary as well as local levels in order to facilitate future consultation processes. The aim is to create a model for improving the engagement of older people in dialogue with civil society at the earliest stage in the policy-making process.

Third Sector Forum – Italy

In Italy civil society organisations struggle to be involved in debates with national and local public administrations. In order to strengthen their role, they have created a permanent Forum of the Third Sector (Forum Permanente del Terzo Settore) at national and local level which involves many associations of older people. Its role is to structure the dialogue with both local authorities and national government as well as to discuss technical aspects of the functioning of non-governmental organisations such as fiscal or financial issues.

General legal provisions to support civil society and civil dialogue

In most of the studied countries, there are generic laws or legal frameworks which support the organisation and functioning of civil society organisations including those representing older people.

Standards for public consultations – Bulgaria

Since October 2010 it is compulsory for the government to uphold national standards for public consultations when preparing normative and political documents. These standards were adopted by the Council for Administrative Reform – chaired by the vice-Prime Minister – and are based on recommendations from Bulgarian civil society organisations. They also draw inspiration from good practices in promoting civil society involvement in policy-making across EU Member States. The procedure for consultation starts with the publication of draft materials on a web portal for public documents (www.strategy.bg) for not less than 30 days. During this period of time, citizens and civil society organisations submit their recommendations and suggestions for changes. Depending on the complexity of the issue, this deadline can be extended if necessary. Public authorities are then expected to engage all interested stakeholders in negotiations. These national standards for public consultation are a first step towards ensuring a more transparent decision-making process and accountable governance.

National Forum on Active Citizenship and Participation – Germany

In Germany the strengthening of civil society is promoted by the Federal Government which uses legal provisions prepared by the Ministry for Family Affairs, Senior Citizens, Women and Youth. These legal provisions aim to improve the institutional framework and conditions for a broad civic involvement, for example they promote common participation standards similar to those developed in

the federal legislation on volunteer service providers. This federal action provides new impetus to achieving active citizenship at national level while direct assistance to civil society actors is provided at the grass-roots level. The National Forum on Active Citizenship and Participation, *BBE- Bundesnetzwerk Bürgerschaftliches Engagement*, is coordinated by the German National Network for Civil Society which links the Federal Government, Bundestag, Federal States, municipal public authorities, umbrella organisations and local civil society agencies, churches, and representatives from industry and research sector. Several older people's organisations take part in this process.

National Observatories for Social Organisations and for Voluntary Work – Italy

In Italy the cooperation between civil society and public authorities is regulated through national and regional laws but civil dialogue as such is neither recognised nor structured. There are national laws referring to different areas of civil society activities, for example on social policies, voluntary work and provision of social services. These first two areas of law, i.e. social organisations and voluntary work have established national observatories ('Osservatorio Nazionale dell' Associazionismo' and 'Osservatorio Nazionale del Volontariato') in which civil society organisations are involved. These two observatories help the national government not only to promote grass-roots initiatives but also to prepare and monitor the policy-making process. The law regarding social services provision also foresees that public authorities should involve third sector representatives in the design, organisation and implementation of national and local strategies for social services.

National Act 'Public Benefit and Volunteer Work' – Poland

The National Act for Public Benefit and Volunteer Work (*Ustawa o Pożytku Publicznym*), introduced in 2003 and amended in 2010, addresses a number of issues related to cooperation between

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public authorities and non-profit organisations. The Act stipulates that public administration authorities shall provide support whenever public tasks are performed by non-governmental organisations engaging in statutory work in a specific area. Moreover, the Act provides that public administration authorities shall delegate the performance of public tasks to non-governmental organisations.

The same Act also established a Public Benefit Work Council (*Rada Pozytku Publicznego*) as a consultative body in the cabinet of the Minister of Social Affairs, comprising representatives from both the non-governmental sector and the central and local state administration. Although the Act applies to all civil society organisations, it provides a significant tool to facilitate the involvement of older people’s organisations in policy-making. The Act invites local public authorities to establish frameworks for public consultations in the preparation of legislative proposals at local level. These consultations should include non-governmental organisations among the stakeholders.

Civil dialogue across all levels of governance

Promotion of well-being and quality of life among older people depends not only on the existence of structured and transparent civil dialogue frameworks but equally on the capacity to share and coordinate policy-making between relevant stakeholders including civil society at all levels. A common effort is therefore needed to mutually reinforce their respective knowledge, expertise and initiatives so that civil dialogue, once established, provides an effective and tangible change in older people’s lives. The ageing population will impact on the whole of society and on all age groups. This fact provides older people’s organisations with the legitimacy to claim a direct voice for older people in policy debates. Decision-making at local, regional, national and European level has to be coordinated and interconnected in order to adequately support policies on ageing.

Policy-making that is close to people’s lives

The approach adopted by third-sector organisations to influencing policy-making varies according to the level at which they operate. For organisations operating locally and in proximity to ordinary people and local decision-makers, it is easier to initiate a debate, table a proposal or react to a concrete policy measure. Civil dialogue at local level is closely connected to people’s day-to-day concerns and issues. Participatory structures such as citizens’ councils can connect the local population more easily to its policy-makers and propose solutions which apply to people’s immediate environment and that most effectively address their needs. The use of consultation tools such as local surveys, referenda, face-to-face meetings etc. is also easier and more frequent due to the geographical proximity between citizens, their representatives and the institutional actors.

Geographical proximity among local stakeholders can facilitate civil dialogue and enable the achievement of a consensus on what is the most beneficial course of action to take for the local community. Civil dialogue at the lowest level is an integral part of participatory democracy where individual citizens, their representatives, interest groups and policy-makers shape and implement policies together.

However, numerous obstacles exist to implementing such an inter-connected civil dialogue. The following structural organisational and psychological barriers can prevent public authorities from adequately addressing the concerns of their citizens including older people.

Difficulties in accessing and influencing policy-making at national level

Policy development is a complex, technical and laborious process, in particular at central level where national strategies or legislation are elaborated, implemented, monitored, assessed, reformulated or amended.

However, most decision-makers and policy-makers underestimate the capacity of civil society to take an active role in shaping policies at this level and tend to move grass-roots organisations aside in the process. Consequently, the third sector struggles to be involved in policy debate and to play an active role in the elaboration of national strategies.

Access to policy-making and an ability to influence its outcomes is also unequal among grass-roots organisations themselves. Those organisations established and working in capital cities and/or metropolitan areas have greater access to the necessary information, can contact relevant decision-makers directly, gather the material and support they need to submit a proposal or position etc. On the other hand, civil society organisations in more remote areas from policy-making circles have increased difficulties in accessing public authorities at national level and in engaging in a permanent debate on policy issues.

Weaknesses of cross-level coordination

Multiplication of policy-making processes at country level can result in the development of policies which fail to address local realities in a comprehensive way or to meet the specific needs of groups of people at community level. If national strategies or action plans are to bring about a positive change to people's lives, they need to take full account of local social, economic or cultural contexts. To do so, coordination on policy work is indispensable among public authorities at all levels. In turn, this should facilitate the adaptation of national strategies and policies to specific local contexts.

This applies equally to third-sector organisations which are active in influencing policy-making at national level. They can successfully influence a policy development due only to close cooperation with their local branches, local communities and individuals who have a more accurate awareness of what is at stake in a given region, town,

district or rural area. This can be achieved only through a broad and coordinated civil dialogue involving all interested individuals and stakeholders.

National civil dialogue complements EU civil dialogue

Mechanisms for civil dialogue established at local, regional and national level not only mutually reinforce the overall policy-making processes but also strengthen the role of civil society at EU level. Although policy-making in the social field remains the responsibility of each Member State, further progress can be achieved by sharing ideas, experiences, benchmarking and learning between EU Member States.

The Open Method of Coordination in the social field (Social OMC) – as part of the Lisbon Strategy 2000-2010 – facilitated civil social organisations' involvement in developing social policies at EU and national levels. One of the key objectives of the Social OMC was good governance, transparency and the involvement of stakeholders in the design, implementation and monitoring of policies on pensions, social inclusion, health and long-term care. EU level action was supposed ensure that social inclusion policies were well-coordinated and involved relevant stakeholders at all levels. People experiencing poverty and social exclusion were actively involved in this process. The Social OMC also enabled older people's organisations representing the voice of older people experiencing poverty to participate in policy debates at both European and national level.

The Social OMC process has been incorporated into the Europe 2020 Strategy and is now part of its flagship initiative on the reduction of poverty and social exclusion. According to the European Commission, the way in which stakeholder involvement will be organised within this new European framework should be clarified during 2011. Civil society organisations hope that the principle of including civil society and their organisations in policy coordination on social policies across the EU will not only remain but will be improved.

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Indeed, in many Member States the requirement of consulting civil society in the preparation of EU level strategies provided an effective tool to influence national policy-making processes.

Civil dialogue was also introduced as the first principle among the governance principles in the **Lisbon Treaty** (Article 11). According to this Article, participatory democracy, based on stakeholder involvement, can reduce the so-called democratic deficit of the European Union. Article 11 provides a legal basis for civil dialogue – recognising it as distinct from social dialogue – and involves the responsibility of all EU institutions. Following this logic, the active participation of all citizens and their representatives should become a principle of good governance and eventually form a complement to representative democracy. Thus civil dialogue will become one of the major tools in policy and decision-making processes in the EU context.

The EU institutions are required to conduct “an open, transparent and regular dialogue with representative associations and civil society”. In accordance with Article 11, the EU institutions have a joint responsibility to ensure that organised civil society, which embodies the aspirations and interests of EU citizens, is actively involved in the formulation of EU policies and processes. A genuine and long-lasting commitment of all EU institutions to engage in a permanent and structured dialogue with organised civil society at European level is therefore essential.

II. Involvement of older people’s organisations in civil dialogue

Active involvement of ordinary people in policy-making through consultations, round-table discussions, public debates, consensus conference, informal meetings etc. reinforces participative democracy

by facilitating partnership among all interested parties to organise and govern the society. However, in order to ensure that citizens’ involvement is a genuine dialogue with decision-makers and other relevant stakeholders – rather than a simple exchange of information – there is a need for legal frameworks on civil dialogue which set up rules and clarify the objectives of the process. A structured civil dialogue must be based on stakeholders’ mutual knowledge regarding their respective rights, responsibilities and expectations.

What are the benefits of participation in civil dialogue?

For older people

Civil dialogue provides an opportunity to influence processes where overall political objectives are transformed into concrete policy actions and to follow-up on these measures. Older people themselves, with few exceptions, have little knowledge of how to influence policy-making processes. Those confronted with poverty and/or social exclusion are even less involved in mainstream societal debates or participatory initiatives. The active participation of older people in the design, development and implementation of policies therefore provides them with a chance to be heard and for their views to be taken into consideration. Participation in civil dialogue not only gives an older person an opportunity to comment on a particular issue but also recognises her/him as an equal partner in the discussion.

The active and regular participation of older people in civil dialogue helps, in particular, to:

- Strengthen their self-confidence and increase their self-esteem;
- Inform and reinforce their awareness of economic, social, institutional or societal issues;
- Better articulate and express their needs and requests which, in turn, are better understood by external actors;
- Mainstream a greater understanding among the public of older people’s needs, particularly of those who

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are most vulnerable and whose perspectives on social inclusion policy are often missing;

- Improve general attitudes towards older people in society and assist in creating and consolidating alliances and links with other age groups;
- Create and further improve solidarity among all population groups and support intergenerational exchange and cooperation.

For older people's organisations

The aspiration of older people's organisations to take active part in civil dialogue does not only reflect their wish to influence policy-making; it also serves as a means for them to improve the understanding of the ageing phenomenon within society. Senior organisations want to be an equal partner in policy debates in order to further disseminate the concerns and requests expressed by their constituencies. Older people's organisations can also ensure feedback for their members about relevant policy developments. This helps older people to better understand these developments and can mobilise them to react to them when appropriate.

Mechanisms for the consultation and participation of older people's organisations help to:

- Improve the visibility and strengthen the voice of the ageing populations they represent;
- Disseminate older people's requests, make these better understood externally and mainstream them across all policy-making processes;
- Confirm organisations' status as representative of older people;
- Define their own role as an equal partner in policy developments;
- Engage more older people to join such organisations and get involved in defending their own rights;
- Attract more older people's organisations to participate in policy-making and to represent older people in this process.

For decision-makers

Openness and transparency throughout the entire policy-making process – from its design, approval, implementation, monitoring to assessment and eventual reformulation – not only facilitates the development of new law, implementation of policy measures or the improvement of their quality, it also reinforces the democratic system. The ultimate objective of decision-makers should be to implement measures that best serve the needs of the whole population, including those groups with weak representation in the mainstream policy and/or society sphere. The ongoing involvement of civil society at all stages of the decision and policy-making process is a prerequisite for participative democracy.

Allowing and supporting a permanent participation and contribution from older people's organisations in policy-making is instrumental in helping policy-makers to:

- Adjust policies and strategies at all levels to the needs of older people, in particular the most excluded who are absent from policy debate and struggle to enjoy their rights;
- Build a broad consensus among different population groups for the proposed policy measures and obtain their support for long-term reforms e.g. in social protection systems;
- Understand better older people's needs and promote these further through policy-making so they become accepted and gain widespread support;
- Use the knowledge, expertise and potential of older people and their organisations for the benefit of society as a whole.

What are the barriers and challenges to getting involved?

The persisting barriers and challenges for a dynamic civil dialogue are of both an 'external' and 'internal' nature. The external barriers can be described as 'unfriendly' institutional environments and legal barriers. There is a general lack of a participatory

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culture to enhance civil dialogue and involve fully and permanently civil society in debate on policy developments. The internal obstacles, however, are attributed to civil society itself: inadequate organisational capacities, insufficient empowerment of citizens, lack of common interest etc. Indifference to democratic structures and mechanisms within civil society itself can also prevent civil society representatives from having an impact on policy developments.

External barriers

Access to Information

From the perspective of older people, the major external challenge to taking part in policy debates and developments is the lack of access to information. When involving external stakeholders in such debates, public authorities do not take into account the difficulty that ordinary citizens and their organisations have in obtaining the necessary information about 'when, where and how' they can participate in debates on issues that concern them. Given today's context of a constant inflow of news and information, it is even more complex for citizens to select and find the information they are looking for. Public authorities have a duty to guarantee equal access to information for all including information about the existing channels and/or platforms for exchange and co-decision in policy-making.

Inadequate legal environment

There is a general lack of legal provisions to support citizens' permanent participation in debates on institutional, social, economic or other relevant topics. Civil dialogue frameworks on ageing issues and, in particular, on social integration, well-being or quality of life in old age, are even rarer. For instance, many of the existing citizens' councils at municipal level rarely focus directly on ageing issues, even though older people represent a growing part of their respective local communities. The space provided by these participatory initiatives to discuss specific older people's concerns such as inadequate provision of long-term care services, disability problems or social exclusion is particularly limited.

Resistance to share power with civil society

Psychological and cultural barriers persist among policy-makers including civil servants which prevent them from sharing their decision-making power with non-institutional stakeholders, in particular civil society representatives. Decision-makers often do not want to give more 'power' to civil society or even formally recognise its role and influence. Additionally, even where frameworks for civil dialogue exist, older people's organisations struggle to claim their right to be consulted and contribute to policy-making. When policy-makers speak about participation, they usually think about the provision of simple information after decisions have been taken rather than regular and effective discussion during the development of policies.

Little interest in vulnerable groups

Policy makers usually misunderstand the issue of participation in general and this is particularly pronounced for society's most vulnerable and invisible social groups. When dialogue is attempted, it is also usually done with those groups and individuals that are already somehow involved in mainstream society. Most disadvantaged older people - whether they are experiencing poverty or social exclusion - are rarely the focus group for initiatives for social participation or civil dialogue. There is also a tendency to avoid consultation on controversial issues but rather to focus on those that hold a particular interest for decision-makers. For instance, debates on active ageing focused mainly on the professional activation of older workers with whom dialogue is easier and can deliver a concrete benefit. Such a narrow approach to civil dialogue undermines the whole principle.

Internal barriers

Lack of self-confidence

Lack of self-confidence among older people prevents them from taking individual or collective initiatives to express their concerns. This can often come from the fact that the complexity of policy processes or consultation procedures discourages older people from active involvement in

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policy-making. There is a general lack of confidence among many older people regarding their skills or capacity to take part in an organised debate. Many citizens are not used to speaking in a broad forum or articulating their concerns or formulating recommendations. Knowledge about the existing participative processes is also weak which is another reason preventing older people from taking an initiative.

Citizens' mistrust in politics and democracy

The growing gap between politics, on the one hand, and people's daily realities, on the other hand, has been gradually increasing people's alienation from debates on policy developments and, in turn, is discouraging citizens from participating in democratic mechanisms. While there are also some older people with little or no interest in influencing policy developments, it is more often the case that older people do not see the value of participating in civil dialogue and are convinced that their voice will have little if any impact on the final decisions and outcomes.

Lack of resources

Non-governmental organisations are often underfunded and when subsidies exist, these are often either in the form of ad hoc or short-term grants which do not enable the organisations concerned to do much more than maintain their daily activities. The lack of financial resources and the consequent risk of interruption to current activities undermine civil society's capacity to engage in a lasting dialogue on policy developments. Policy-making processes are cyclical and require regular involvement at all stages including design and elaboration of a policy, its implementation, monitoring, assessment and reformulation. In the absence of regular financial support from public authorities, civil society organisations cannot play the role they are asked to take. Their contribution to policy-making can therefore only be partial and as such inadequate.

Representation of older people

Civil society organisations have always been at the forefront in calling on governments for more democratic standards including participatory mechanisms such as civil dialogue. Yet, some NGOs themselves fail to apply such standards internally within their constituencies. Their manner of electing their own leaders, their internal working procedures and processes of policy-making, and the way in which they coordinate actions across organisation branches etc. can also fail to meet democratic standards. A further issue is the lack of political parties representing older populations at national level. Such representation could facilitate lobbying at national level and place pressure on national governments to address older people's issues.

What are the factors for successful involvement?

The following internal factors can enhance the involvement of older people and their representative organisations in the policy-making process:

- **Awareness about rights and obligations**
 - regular training and information are a prerequisite for older people's self-confidence and understanding of the institutional environment;
- **Awareness about current developments**
 - continued two-way communication with older people and provision of feedback from lobbying activities or on other initiatives taken by older people's organisations to influence decision-making processes;
- **Involvement of the most vulnerable** – reach out, inform, help and encourage the involvement of the most vulnerable older people who are unable to claim their rights;
- **Motivation to act on behalf of other older people** – the ageing population needs its own leaders and experts ready to initiate actions and get involved in representing them externally;
- **Communication skills** – empower and train older people on how to speak in public and/or directly to public authorities

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and politicians i.e. they are more effective and are perceived as having more credibility when they speak directly on their own behalf;

- **Internal coordination on ageing issues** – ensure that policy positions are developed collectively within older people's organisations' constituencies and based on a large consensus i.e. a common view across all members at all levels on a given subject;
- **Promotion of informal networks and alliances** – provision of links between all existing initiatives, movements or organisations, both formal and informal, that are working with and for older people;
- **Cooperation within civil society** – look for common issues and develop joint argumentation and positions with civil society organisations representing other population groups e.g. children, youth, women;
- **Networking outside civil society** – join forces with other stakeholders such as service providers, local police, industry, business, educational bodies etc. in order to obtain their support and increase the effectiveness of lobbying initiatives.

The following external factors which depend on public authorities' actions can also facilitate the involvement of older people and their representative organisations in civil dialogue:

- **Openness and accessibility** – public authorities and policy-makers at all levels must be accessible for older citizens and their representative organisations in terms of facilitating debate with them and allowing them to input to the shaping of policy developments together;
- **Co-responsibility and cooperation** – recognise the role of civil society and, in particular, of older people's organisations as an equal partners in decision-making processes with the right to contribute to institutional and policy developments;
- **Positive institutional environment** – provide legal frameworks and organisational/financial support in order to set up representative advisory bodies on ageing issues e.g. local senior councils, permanent forum on ageing issues,

parliamentary commissions or intergroups on ageing;

- **Transparency and accountability** – set up standard procedures and rules for civil dialogue and participatory processes at different levels i.e. improve older people's access to national and local authorities;
- **Cross-level coordination** – strengthen links between EU, national and local levels of policy-making in order to enhance and facilitate civil society's engagement and participation in debating and shaping policy developments.

III. Recommendations to strengthen civil dialogue

Recommendations to strengthen civil dialogue

In order to guarantee that older people are effectively involved in decision-making processes, civil society organisations and public authorities have a common responsibility to facilitate and organise such participation. The following brief guide presents older people's organisations and public authorities' respective tasks and duties to make civil dialogue on ageing a reality.

Firstly, our recommendations propose suggestions on how to empower older people themselves. Such capacity building is mainly for older people's organisations who need to provide older people with the necessary information, skills and knowledge to become involved in the policy-making process. A dynamic civil dialogue on ageing will become possible thanks to older people who are aware, self-confident and ready to represent the interests of their society's older populations.

Secondly, we present tasks for public authorities at national, regional and local levels which, in our view, must be fulfilled in order to support and implement a structured and lasting civil dialogue on ageing.

"A dynamic civil dialogue on ageing will become possible thanks to older people who are aware, self-confident and ready to represent the interests of their society's older populations."

The engagement of each of these political levels is equally important in order to make civil dialogue a reality where the voice of older people is heard and taken into account at every stage in the policy making process.

Tasks for older people's organisations

How to empower older people

Educate and teach new skills

- **Improve older people's self-esteem and self-confidence** by facilitating their access to lifelong learning and education and by encouraging their creativity, confidence and visibility;
- **Teach older people practical skills which will enable them to take an active part in societal debates** e.g. how to speak in public, write a petition, use the internet and other technologies;
- **Provide training to improve older people's understanding about local and national politics and policies.** Such knowledge is essential to enable them to become actively involved in society and participate effectively in civil dialogue.

Inform and raise awareness

- **Inform ordinary older people about their rights and duties** in order to mobilise them to participate actively in democracy e.g. in local elections, referendum;
- **Raise older people's awareness about democratic mechanisms and participatory processes** i.e. what it means to be active in civic life, why it is important to express their direct voice, what can be achieved through such active participation.

Get involved and engage in grass-roots movements

- **Facilitate older people's involvement in the daily work of senior organisations** through practical means e.g. accommodate mobility, health or other constraints by providing free transport to attend meetings, disseminate information and feedback to the most excluded through telephone interviews, face-to-face discussions or written summaries of activities sent by post;
- **Encourage older people to participate, speak for themselves and defend their interests** in existing civil society initiatives, in particular at local level such as senior councils, advisory committees in care homes, third-age universities, community and neighbourhood groups, local associations etc.

Be inclusive

- **Identify, contact and invite the least active older people** to participate e.g. seek out the most vulnerable older people such as the poor or excluded, single older people, older women, people with early dementia, older people from ethnic minority groups, those living in remote areas;
- **Promote mutual support within the older population** by developing a sense of solidarity among older persons including those experiencing poverty and/or social exclusion i.e. every older person who wishes to must be able to join a representative organisation;
- **Organise meetings, informal exchanges or thematic discussions with other age and population groups** in order to strengthen older people's feeling of belonging to a broader society based on diversity and tolerance.

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How to participate in civil dialogue on ageing

Collect evidence from grass-roots level

- Run participatory meetings with older people at local level prior to the preparation of positions, responses to public consultations etc. These meetings must express the voice of ordinary older people and collect their views on their own needs and concerns;
- Ensure the voice of the most vulnerable older people is recorded and accurately conveyed to decision-makers e.g. of single older people, older women and older people from ethnic minorities;
- Get the social realities of older people better known by telling older people's stories – use concrete examples of age discrimination i.e. present real cases from everyday life.

Anticipate and initiate debate

- Regularly ask for invitations on behalf of older people to allow them to participate in existing civil dialogue structures to make sure that all available channels and mechanisms for civil dialogue are used effectively;
- Submit regular own-initiative positions, opinions, recommendations etc. on relevant policy issues in order to bring attention to older people's concerns;
- Initiate exchange and debate with external stakeholders and the general public on issues where the voice of older people must be expressed in particular on taboo issues such as elder abuse, multiple-discrimination etc.

Cooperate with stakeholders

- Engage in work with other civil society organisations representing different population groups e.g. children, youth, women, people with disabilities, ethnic minorities, and social inclusion to improve their understanding about the positions of older people and to build common strategies on shared issues;
- Involve relevant stakeholders in debates on ageing issues through common activities e.g. research and surveys, policy

debates and awareness-raising events in order to build up networks on specific topics with supportive actors from different fields;

- Attract external experts with skills and knowledge about ageing issues and/or policy work and use them as an asset and a support to advancing older people's interests e.g. in the preparation of position statements;
- Acknowledge the role and contribution of prominent and well known older people in their professional or personal capacity and obtain their support to promote the social inclusion of all older people.

Communicate results

- Act politically by developing a list of demands and send it out to candidates prior to elections;
- Use the media, in particular at local level, to disseminate information and communicate the realities and daily challenges that older people face;
- Use different channels for disseminating information about policy debates and raise awareness on these among older people and the general public e.g. thematic blogs on ageing issues, social networks to mobilise older people including information on policy processes and 'bottom-up' initiatives.

Provide feedback and follow-up

- Ensure regular feedback to older people through reporting mechanisms such as minutes from meetings, summaries of position statements, contributions to consultations, thematic newsletters, telephone interviews etc.;
- Follow-up and contribute to all successive stages of policy development. Continuity in lobbying is indispensable in influencing decision-makers.

Tasks for public authorities

How to support a structured and sustainable civil dialogue

Empower older people's organisations

- Pay equal attention to all organisations that are working to enable older people to participate in policy-making i.e. involve all organisations regardless of their experience or knowledge about policy work so that every voice in civil society is heard;
- Provide training to strengthen older people's organisations knowledge and skills required for participation in policy-making e.g. on legal issues, specific themes with regard to ageing such as social services and pension reforms, and practical aspects such as lobbying techniques;
- Support financially older people's organisations so they can become active stakeholders in policy development. This can be done through multi-annual operational co-funding, short-term grants, thematic projects and/or ad hoc assistance for daily activities such as reimbursement for travel/accommodation, internet access etc;
- Defend older people's interests when putting in place national, regional or local coordinators who will be contact points with civil society in order to give visibility and emphasis to old age and the needs of our ageing population.

Provide a legal environment

- Set-up legal frameworks for civil dialogue including with older people and their representatives. Public authorities at national level, in particular, have to provide conditions for participative initiatives which involve older citizens in shaping policy-making processes on a permanent basis;
- Agree and enforce common quality standards for civil dialogue that facilitate a genuine exchange on policy issues with civil society. Legal frameworks for civil dialogue should be put in place in

order to guarantee transparency and accountability;

- Provide national guidelines for the strategic engagement of older people for the benefit of local authorities and other stakeholders including civil society organisations.

Strengthen transparency and accountability

- Promote civil dialogue frameworks and mechanisms by publicising and disseminating information on existing or planned participatory or consultation processes at all levels i.e. make them as widely known as possible;
- Ensure access to work or policy agendas, research reports or any relevant information prior to meetings with older people's organisations so that older people's representatives can prepare in advance for these discussions;
- Train decision-makers and civil servants about the role of participatory governance. They need to understand why and how power should be relocated from traditional political institutions to new forms and frameworks for political participation.

Provide feedback

- Provide regular follow-up during and after consultation processes in order to enable older people's organisations to react and contribute at each stage of the policy-making process;
- Facilitate the involvement of the most excluded groups in decision-making processes. The scope for the involvement and influence of these groups is usually uncertain and needs to be specifically facilitated.

Coordinate

- Enhance awareness and understanding of the existing legal frameworks and/or quality standards for civil dialogue between central and local government in order to fulfil duties imposed on policy-makers regarding stakeholder involvement in policy-making;

- **Facilitate stakeholder involvement across the country** including in small towns, villages or local communities which are furthest from mainstream policy-making;
- **Develop and improve communication channels to support discussion between all existing civil dialogue forums** in order to share good practice and identify recommendations for policy making at central level.

Conclusions

The main purpose of civil dialogue is to allow an exchange between policy-makers and relevant stakeholders, including civil society. The results from the feedback interviews carried out alongside the INCLUSage project revealed older people's growing willingness to be actively involved in policy debates. However, policy-makers and civil servants do not often want to admit civil society into these debates or do not know how to actively support such organisations to take part in the policy-making process. Fortunately, mentalities and attitudes are evolving and there are an increasing number of both informal initiatives and legal frameworks being set up to promote an active civil dialogue.

From the perspective of older people, the major benefit from participating in policy planning and influencing policy implementation is the improvement in the quality of life for older people in general. Through civil dialogue on ageing, policy measures can be developed which will better meet older people's concerns and needs. Civil dialogue is about listening to people's views and encouraging and recognising their contribution to the communities in which they live. INCLUSage partners hope that this Guide will help ensure that older people are engaged as equal citizens and that their voice is not only heard but also influences policy developments around ageing issues and societal inclusion. Active citizenship and well-being are rights for all regardless of an individual's age.

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