

**AMASE – A MULTIDIMENSIONAL APPROACH
TO SOCIAL EXCLUSION IN LATER LIFE – HEALTH
CONSEQUENCES FOR AGEING POPULATIONS.
A RESEARCH PROJECT AIMING TO UNDERSTAND
AND LESSEN SOCIAL EXCLUSION**

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*S*ocial exclusion of older adults represents a focal problem in Romania. It has a multidimensional character, manifesting in multiple areas: exclusion from social relations, from material resources, from services, from community and society. This paper presents the rationale of the AMASE¹ project, our research and social policy objectives, as well as our work philosophy.

Keywords: social exclusion; vulnerability; ageing; Norwegian grants.

Social exclusion in old age is a key problem in the context of an ageing Europe. Almost one in five persons over 65 years old were at risk of poverty or social exclusion in the European Union countries (EU28) in 2019, and one in three persons were running the same risk in Romania (Eurostat 2021, ilc_peps02). Older people have higher risks to be socially excluded than the rest of the population due to particular factors associated with age, like poor health, loss of relatives and friends, and lower levels of physical and social activity. The AMASE project (Principal Investigator Iuliana Precupețu) sets out to better understand social exclusion in older age in European countries, and to contribute to the diminishing of the phenomenon.

The research project has two main goals: (1) *enhancing research-based knowledge on the multidimensional nature of old age social exclusion and its consequences for mental and physical health of older adults*, and (2) *identifying social policy implications that take into account the national context and identifying strategies for creating conditions that minimize social exclusion of disadvantaged groups*. To reach them, the project will describe levels and patterns

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in the multidimensional nature of old age social exclusion, will assess and explain the relationship between social exclusion and health inequalities in older adults, will identify social groups which are at risk for social exclusion at an older age, and will describe the lived reality of older Romanian men and women who are at particular risk of social exclusion, and the ways they deal with their situation over their life course; the project will also analyze the social protection frameworks for older people with a main focus on pensions, health and long-term care in Romania and Norway. Based on research results, one of the outcomes of the project will be a set of policy measures aiming at tackling social exclusion of vulnerable groups in Romania.

Social exclusion involves separation of an individual from the mainstream society, and is a “dynamic process of being shut out, fully or partially, from any of the social, economic, political and cultural systems which determine the social integration of a person in society” (Walker and Walker 1997, 8). Processes of inclusion and exclusion are features of all hierarchies (Pocock, 1957; Allman, 2013). Although older people have been described since the 60’s by Townsend and Wedderburn (1965) as the largest community living in poverty in the United Kingdom, this problem still persists. In time, various approaches to social exclusion have been employed, initially, poverty being the most utilized indicator of the concept, with authors like Levitas (1998) and Burchardt (1999) focusing on labour market participation as the foremost indicator of social inclusion. But scholars soon understood that this is a narrow approach, and this led to more complex, multidimensional models. Burchardt, Le Grand and Piachauds (1999) included as dimensions of social exclusion the (1) inability to purchase goods and services, (2) inability to participate in economically or socially valuable activities, (3) lack of involvement in local or national decision-making, (4) lack of integration with family, friends and community. Scharf et al. (2005) added several more dimensions: (1) material resources, (2) social relations, (3) civic activity, (4) basic services and (5) neighborhood exclusion. Exclusion from one system may lead to exclusion from some or all other systems, as, for example, lack of financial resources can conduct to less social interaction, which furthermore can lead to a greater dependence on public services; in turn, exclusion from public services may have an influence on civic participation and, ultimately, can be one of the causes for both mental and physical health issues.

Starting from the conceptual model of Walsh et al. (2017), we use a multidimensional approach to social exclusion in older people, by taking into consideration five dimensions: (1) exclusion from social relation); (2) exclusion from material and financial resources; (3) exclusion from services; (4) exclusion from neighborhood and community life; (5) exclusion from civic participation.

The project employs a comparative perspective on social exclusion that enables contextualization of the phenomenon, while also providing a better understanding of the shapes of social exclusion in different European societies.

Comparison also provides the analytical framework for investigating both specificities and differences of social exclusion in Romania and Norway from the other European societies. Moreover, comparison of social policies between the two aforementioned countries enables us to evaluate the solutions adopted for social exclusion and to assess transferability of policies.

The project uses a mixed method approach, by including both quantitative analysis of existing survey data and qualitative life histories. We employ the mixed method approach in order to reach completeness of data, as well as comprehension. Our approach is “concurrent nested” (Creswell, 2003), giving first priority to quantitative method that guides the project, while qualitative research is embedded. With the nested method, we seek to fulfil the different objectives of our research, and to include information from older people on their lived experiences with social exclusion over their life course. Life histories are used to gather information from older people with high risks of social exclusion, among which, women, Roma, people living in rural, etc. Such an integrated strategy (or nested analysis approach) enables us to assess the plausibility of the observed statistical relations, to generate theoretical insights, and to improve the prospects of making valid causal inferences (Lieberman, 2005). In policy terms, the good practices identified at Norway’s level will be used to further build functional integrative social policy mechanisms for Romania.

The project consortium is composed of the Research Institute of the University of Bucharest (ICUB) – University of Bucharest, the Norwegian Social Research (NOVA) – Oslo Metropolitan University and the National Scientific Research Institute for Labour and Social Protection (INCSMPS).

The University of Bucharest (through the ICUB Research Institute of the University of Bucharest) promotes smart research in all fields of science, and is currently implementing a series of nationally and European funded projects, such as *Cultural Opposition: Understanding the Cultural Heritage of Dissent in Former Socialist Countries* (H2020) and *From Corporatism to Diversity: A Neo-institutionalist Study of Representative Student Organizations in Post-communist Romania* NEOSTUD (UEFISCDI). The AMASE project is framed within the Social Sciences Division of ICUB, whose main focus is building a state-of-the-art research infrastructure within the university, and providing scientific evidence for public policy decisions.

NOVA is a research centre of the Oslo Metropolitan University concentrating on issues like childhood studies, ageing and life-course, family, social security and social assistance, housing, migration, the welfare state, health and domestic violence. NOVA has extensive experience in ageing research, over the years implementing projects such as AgePath, CrossCare, ACCESS Life Course infrastructure and the Nordic Project on Social Inequalities in Aging.

The National Scientific Research Institute for Labour and Social Protection (INCSMPS) has extensive experience in research related to social development and

social protection in Romania. The institute has over 25 years of expertise in both designing and implementing national and international research programs in the socioeconomic field, this list including entities such as CEEX, NUCLEUS, PHARE or WORLD BANK.

The consortium is designed to balance the academic side (ICUB and NOVA teams) with the policy analysis and dissemination component (INCSMPS), thus rounding up a thoroughly complex project, aimed not only at understanding the social issues in play, but also at delivering solutions. More so, Romanian and Norwegian team members have a proven collaboration track-record, most recently having worked on a study regarding social exclusion and mental wellbeing in older Romanians (Precupețu, Aartsen and Vasile, 2019).

The AMASE project is innovative on several levels: theoretical, methodological, as well as in terms of dissemination and research capacity building.

Theoretically, the project contributes to new conceptual frameworks of social exclusion, by addressing the multidimensional nature of social exclusion, the evaluation of the interrelations among its domains, and the associations with mental and physical health. The complex theoretical approach involves describing patterns of exclusion in European Union countries, with a focus on Romania and Norway, and examining micro- meso- and macro level correlates with the domains of exclusion. Moreover, it comprises an examination of interrelations between the domains of exclusion and potential social pathways to health. In so doing, the project contributes to a better understanding of social exclusion in general, overcoming the descriptive nature of research on social exclusion in general, and in Romania in particular. A life course perspective is employed, in order to depict the social pathways to exclusion. Social pathways reflect the idea that in order to understand a person's current level of social inclusion or exclusion, and its health outcomes, it is important to know the earlier phases of life. Welfare state provisions, such as pensions and public health care may be of particular importance in our understanding of country differences in social exclusion and its outcomes. Factors associated with social exclusion may accumulate over the life course, probably resulting in the largest differences in social exclusion in later life. Hence, men and women of different birth cohorts, different ethnic groups, and from different societies end up with different degrees of social exclusion in older age.

Methodologically, the project proposes several first time endeavours for Romanian research, while contributing to further developing current understanding of social exclusion in European social research. By combining quantitative and qualitative methods, we employ a mixed method approach, and complement this with policy analysis, with the purpose of designing a set of measures aiming at the social inclusion of older vulnerable groups. This combination of methods and the inclusion of older Roma adults among the research participants is – to the best of our knowledge - new in Romanian research.

The project builds on an integrated plan to disseminate results in order to inform policy and practice. The Romanian partner, specialised in policy analysis and dissemination to policy makers, bridges the gap between research knowledge and practice, by networking with Romanian and European stakeholders in the field of social exclusion and health. Besides the standard scientific dissemination methods (peer reviewed articles, conferences, workshops), the project also uses Internet based ways to inform stakeholders: website, associated Facebook account, articles on scientific specialized blogs.

The project further contributes to research capacity building in Romania through knowledge transfer from Norway to Romania, and through creating new jobs in social research.

More information regarding this project and our research results are on the official website, <https://amase-project.eu>.

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***E**xcluziunea socială a persoanelor de vârstă a treia reprezintă o problemă importantă în România. Aceasta are un caracter multidimensional, manifestându-se în planuri multiple:*

excluziune de la relații sociale, de la resurse materiale, servicii, din comunitate și societate. Acest material prezintă raționamentul proiectului AMASE, obiectivele de cercetare și politică socială, respectiv filosofia de lucru.

Cuvinte-cheie: *excluziune socială; vulnerabilitate; îmbătrânire; granturi norvegiene.*

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