



Peer Review on “Strategies for supporting social inclusion at older age”

Germany, 23-24 September 2019

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Strategies against loneliness and social isolation in old age

DG Employment, Social Affairs and Inclusion

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Table of Contents

Executive Summary	1
1 Situation in the host country	2
1.1 Loneliness and social isolation – concept and meaning	2
1.2 Problematic situation	2
1.3 Loneliness and social isolation in old age in Germany –results of the German Ageing Survey 2017	3
2 Policy measure	6
2.1 Mandate in the coalition agreement 19th legislative term	6
2.2 Responsibilities of ministries	6
2.3 Measures by BMFSFJ	6
3 Results	9
4 Discussion points	10
5 List of references	12

Executive Summary

Results of the German Ageing Survey 2017 show: the risk of loneliness in old age has not increased in Germany over the past decades. Only few middle-aged and old people feel lonely. However, at a very old age, over 80 years, there is an increase in loneliness which is slightly more pronounced in women than in men.

In particular older people over 80 years face a considerably higher risk of loneliness and social isolation if multiple problematic situations coincide, potentially fostering or triggering loneliness and social isolation. Parts of these situations are, for instance, adversity, diseases, decreasing physical mobility, a lack of mobility options, increasing old-age poverty or a migrant background. Furthermore, the group of potentially lonely older people over 80 years of age will drastically increase in the next few years. This will happen within a relatively short period of time due to the 13 million baby boomers (currently 27 per cent of the German workforce) who will cease to be part of the labour market between 2018 and 2031 and due to the steady ageing of the population.

In the coalition agreement between CDU (Christian Democratic Union), CSU (Christian Social Union) and SPD (Social Democratic Party of Germany) it has been agreed to develop strategies and concepts to prevent and combat loneliness in all age groups. For this reason, even now, various measures, initiatives and project contractors are being supported that contribute to supporting in particular older people in keeping up their self-determined life in society, based on equal rights. The Federal Government is currently reviewing to what extent existing strategies and concepts suffice to reach these objectives and to what extent further action is required at the federal level.

In this context, with the guiding principle "We take care of those who care for others" the Federal Ministry for Family Affairs, Senior Citizens, Women and Youth (BMFSFJ) aims to strengthen and build connections in society via diverse measures, e.g. various projects seek to create places where people can get in touch with each other, establish mentoring programmes or strengthen voluntary commitment. This way, BMFSFJ promotes a self-determined life and participation in old age with the help of various measures and counteracts loneliness and social isolation, *inter alia* with a national competition, an expert conference, civic engagement and multi-generational homes.

It has become clear from the measures and projects implemented up until now that there continues to be the need to promote expert exchange and networking on the ground and within the municipality in a targeted way to cope with loneliness and social isolation in old age and to share best practice. Therefore, BMFSFJ intends to keep up its support of the development of corresponding strategies and concepts.

With the help of the Peer Review, BMFSFJ intends to promote the exchange of experience of potential solutions and concepts with other EU countries as well as to develop strategies which are based on best practice, studies and other European countries' experience.

1 Situation in the host country

1.1 Loneliness and social isolation – concept and meaning

"Loneliness" and "Social isolation" are different phenomena. Researchers speak of loneliness when they deal with the subjective feeling of loneliness. Loneliness is a subjective feeling of not having the desired quantity and quality of social relationships. Whether a person feels lonely depends on the individual state of mind.

In contrast to that, social isolation designates a substantial lack of contact with other people and due to the lack of social contacts and social relationships it can be measured in an objective way. Social isolation is therefore the objective shortage of social contacts which exists irrespectively of individual expectations when it comes to relationships.

Whereas social exclusion is the process in which people are denied access to rights, opportunities and resources which would normally be available to members of a different group and which are fundamental for the social integration and the observance of human rights within this specific group.

Living alone and loneliness are *not* always the same. Loneliness can also be a voluntary individual decision and thus correspond to one's own personal inclinations and preferences. This decision should be accepted accordingly.

Loneliness is not equivalent to social isolation but social isolation may trigger loneliness – and loneliness can reinforce social isolation.

The German Centre of Gerontology (DZA) speaks of loneliness "when the social network does not correspond to one's own wishes and standards as regards size and quality of social contact and when people have the unwelcome feeling of being left alone, or when they feel a lack of contact or a loss of contact" (DZA 2014, 3).

Thus, loneliness is not solely based on objective factors such as living alone, being alone and isolation, but also on a subjective factor of experiencing and evaluating situations. Research shows that the objective characteristics of an individual's social network are usually insufficient for adequately predicting their experiences of loneliness'. In this context it is particularly important to understand to what extent existing social connections can meet individual standards and expectations (Dykstra and Fokkema, 2007).

1.2 Problematic situation

Various empirical surveys and studies have identified groups of people who are at a particular disadvantage as a result of their social isolation. Despite differing in research questions and objectives, and focusing on different age groups, these studies have consistently shown how a lack of social contacts and social relationships puts these groups of people in precarious situations. Their social or economic situation raises the question of the necessity of support from the state through various measures.

Research findings have shown that this particularly applies to the group of people of over 80 years. Loneliness and social isolation tend to be more widespread in the age group 80+ than in younger age groups. This age group faces a considerably higher risk of loneliness and social isolation if multiple problematic situations coincide, potentially fostering or triggering loneliness and social isolation. This is shown e.g. by the German Ageing Survey (Deutscher Alterssurvey, Böger and Wetzels and Huxhold, 2017), the Generali Old Age Study (Generali Altersstudie, Köcher and Sommer, 2017), Allbus (Krack-Roberg and Rübenach and Sommer and Weinmann, 2016), the time use survey (Zeitverwendungserhebung, Rapp and Gruhler, 2017). Loneliness is thus not a problem of the 'third age', but probably of the 'fourth age', i.e. not a problem of old people, but of very old people.

Risk factors

Retirement, the loss of social connections as a consequence thereof, a migrant background, widowhood, divorce, decreasing mobility, poor health, the need for long-term care, increasing old-age poverty or also experiences of discrimination are risk factors which may foster or even trigger loneliness and increase social isolation. People who are unable to establish a network of social connections will find this even harder in old age. In particular financial problems, physical limitations and dwindling contacts in old age and in very old age lead to a higher risk of being or becoming lonely in old age.

Health impacts

Constant loneliness and social isolation will have an impact on physical and mental health and may even go hand-in-hand with a shortened life span (Hawkley and Cacioppo, 2010; Cacioppo and Patrick, 2008; Tesch-Römer, 2012). By and large, the evidence base on health impacts of loneliness and social isolation places an emphasis on the social and health policy relevance of the topic in all age groups, not only in the age group 80+.

Need for action due to progressive ageing of the population and of the baby boomer wave

The number of older people in Germany is continuously increasing and this means the number of the group of old-aged and very old-aged people is also increasing. The progressive ageing of the population in Germany becomes particularly obvious with a view to the growing number of the group of old and very old people. In 2019, about 5.6 million people of 80 years or older lived in Germany. Their number will continuously grow in the decades to come to reach 6.1 million in 2030 (share of the population of about 7.4 per cent) (Federal Statistical Office, 2019).

Furthermore, the group of potentially lonely people who will be reliant on support and long-term care will drastically increase in the next few years within a relatively short period of time due to the wave of baby boomers. In Germany about 13 million people will reach retirement age between 2018 and 2031 (around 1 million people every year). These are the baby-boomer generations who were born between the mid-1950s to the mid-1960s, a time with the highest birth rates in Germany. In view of the very heterogeneous and partly broken baby boomers' biographies marked by changes in the place of residence they will presumably be more affected by loneliness in old age – as opposed to previous generations who have almost exclusively lived in traditional families and marriages.

Prevention and Tackling loneliness and social Isolation

It is of social and political relevance to effectively prevent and control unintended loneliness and social isolation. Manifold ideas and concepts are needed to this end as unintended loneliness and social isolation has so many faces and different causes.

For very old people multi-factor interventions must be conducted: creating opportunities for social interaction and providing support in case of lacking resources. Interventions not only need to be age-specific but they must also specifically address certain risk groups, e.g. differences in socio-economic status as well as regional particularities should be taken into account. It is important not to reinforce stereotypes of old age by using policy measures.

1.3 Loneliness and social isolation in old age in Germany – results of the German Ageing Survey 2017

The table below, drawing on findings from the German Ageing Survey¹ (Huxhold and Engstler and Hoffmann, May 2019) shows the proportion of people in Germany aged

¹ Since the mid-1990s, BMFSFJ has been funding the German Ageing Survey (DEAS) which is conducted at the German Centre of Gerontology (DZA). The DEAS is the most significant

45 and over who reported to feel lonely for the years 2008, 2011, 2014 and 2017. People are categorised as lonely who reach an individual scale value of over 2.5 in the survey using the internationally used 6-item short scale by de Jong Gierveld and van Tilburg (2006)² with a potential value range from 1 to 4 (high degree of loneliness). The data refer to people living in private households at the place of their main domicile.

Loneliness rate of 45- to 84-year-olds according to age group, 2008-2017 in per cent

Age (in years)	2008	2011	2014	2017
45-54 years	9.6	10.5	10.1	11.0
55-64 years	8.0	8.5	10.0	8.9
65-74 years	7.2	5.1	7.0	8.1
75-84 years	9.9	5.2	7.1	7.5
Total (45-84)	8.6	7.9	8.9	9.2

Source: German Centre of Gerontology, German Ageing Survey (n2008: 5,543, n2011: 3,737, n2014: 7,412, n2017: 5,255)

The share of lonely people among the population between 45 and 84 years during the observation period fluctuates roughly between eight and nine per cent. Noticeable is the fact that loneliness rates by no means constantly increase as people grow older. The development of the number of lonely people is also impacted by the change in the population's age structure. The ageing process of the baby-boomer generation leads to a situation where the population group of the 45- to 84-year-olds is overall increasing and thus also the number of people in this age group who suffer from loneliness. Despite a decrease in the loneliness rates, for the 75- to 84-year-olds there is an increase in the number of lonely people between 2008 and 2017. In 2017, more than 3.5 million people in the group of 40- to 84-year-olds were affected by loneliness. Therefore, in view of the serious health consequences, tackling loneliness at the same time means large-scale preventive healthcare.

longitudinal study on the topic of old age and ageing in Germany and it is an established survey in the field of ageing research at the national as well as international level, covering people from 40 to 80 years. For the older age groups from 80 / 85 years there are **no representative** data available as the number of those surveyed from this age group is too small. Evaluations of existing studies show that people over 80 are more often affected by loneliness than "younger" age groups. The German Ageing Survey (DEAS) has been conducted since 1996 and makes it possible to describe gender-specific (male and female) courses of ageing over a long period of time during the 'second half of life'. Between 1996 and 2017 there were six survey waves (1996, 2002, 2008, 2011, 2014, 2017). Knowledge about courses of ageing in women and men are necessary in order to be able to develop effective programmes and measures for ageing people and to create framework conditions so that women and men may grow old and at the same time maintain an equally high quality of life. <https://www.dza.de/forschung/deas.html>

² The internationally used loneliness scale by de Jong Gierveld and van Tilburg (2006) constitutes the basis. It is an indirect procedure to determine loneliness. Here a loneliness scale is used consisting of a total of six (three negative and three positive) statements (items). In the version used in the German Ageing Survey for these statements/Items it has to be indicated whether they apply to oneself "completely", "rather", "rather not" or "not at all" (4-tiered answer scale). The items are the following ones: "I miss people who I feel comfortable with", "I often feel abandoned", "I miss emotional security and warmth", "There are enough people around who would help me out if I had problems", "I know many people who I can truly rely on", "There are enough people around who I feel close to".

Key findings of the German Ageing Survey 2017 (Huxhold und Engstler, April 2019) are as follows:

- Loneliness is not an inescapable fate in old age. The risk of loneliness in old age has not increased in the past decades. Only few middle-aged and old people feel lonely. Loneliness is on the increase only when people are very old, in women this trend is slightly more pronounced than in men.
- The risks of social isolation and loneliness vary in degree and evolve in different ways while growing older in the second half of life. The likelihood of being socially isolated drastically and almost continuously increases with age from about four per cent at the age of 40 to about 22 per cent at the age of 90. However, the likelihood to be lonely when growing older takes a U shape: at the age of 40 it amounts to about eleven per cent, then it decreases to about eight per cent at the age of 70, afterwards it increases again to about eleven per cent at the age of 90.
- The risk of isolation differs during the life course between women and men. In men the risk of social isolation in the surveyed age range from 40 to 90 years increases relatively consistently from five to 20 per cent. In women, up to an age of about 80 years, the likelihood to be socially isolated is slightly smaller than in men. However, this likelihood in women increases more drastically as they live longer than men. From about the age of 80 the likelihood in women to be socially isolated is higher than in men.
- Also the risk of loneliness differs between women and men as they age. Amongst middle-aged adults between 40 and 60 years, men are slightly more often lonely than women. However, the gender-specific difference diminishes the older people get and reverses during retirement age so that more very old women are lonelier than very old men. At the age of 90 women face a risk of 14 per cent to be lonely. Men at that age face a loneliness risk of nine per cent.

2 Policy measure

2.1 Mandate in the coalition agreement 19th legislative term

For the first time, it has been agreed in the coalition agreement to develop strategies and concepts to prevent and combat loneliness in all age groups. The Federal Government currently reviews to what extent already existing strategies and concepts are sufficient to that end.

What has been agreed upon in the coalition agreement between CDU, CSU and SPD, 19th legislative term, 12th March 2018

Chapter IX. Cities worth living in, attractive regions and affordable housing, item 5 Homeland with a future, subitem: strengthening civil society and volunteer work p. 116, lines 5482 – 5486:

"Society and democracy need the community. Family ties and a stable network of diverse social contacts promote the individual wellbeing and prevent loneliness. In view of an increasingly individualised, mobile and digital society we will develop strategies and concepts to prevent and tackle loneliness in all age groups."

2.2 Responsibilities of Federal Ministries

Within the framework of ministries' responsibilities, the Federal Government takes into account the topics of loneliness and social isolation in old age as well as loneliness and social isolation in other age groups. For instance, the Federal Ministry for Family Affairs, Senior Citizens, Women and Youth (BMFSFJ) is responsible for older people who may be particularly vulnerable to the risk of loneliness during retirement and the Federal Ministry of Health (BMG) is involved as loneliness can cause illness. Due to the complexity of the causes and - resulting from that - the needs for action, the responsibility for this topic does not lie with just one single ministry within the Federal Government. Each ministry develops concrete strategies and approaches to fight "loneliness" on its own authority, as far as government action is required. Furthermore, it is primarily the responsibility of the regional authorities to plan and implement concrete measures in line with the local conditions.

2.3 Measures by BMFSFJ

BMFSFJ, through various measures and initiatives, supports the independence and equal rights of older people within society.

Since the beginning of the new legislative term, BMFSFJ has been increasingly dedicated to the topic of loneliness and social isolation in old age, and carried out the following initiatives:

- *Workshop "Loneliness and social isolation"* on 4th June 2018 at BMFSFJ in Berlin. The workshop objective was to analyse which age groups are especially affected by loneliness and social isolation and which strategies and concepts exist or need to be developed in order to prevent and to combat loneliness and social isolation in old age.
- *First national competition "Lonely? Twosome? Together!"* for lighthouse initiatives against loneliness in old age. BMFSFJ organised this competition together with the German National Association of Senior Citizens' Organisations (BAGSO) in autumn 2018. The objective was to raise the visibility of and to publicly honour the diversity of civic engagement. For the national competition there were more than 600 applications in five categories.
- *BMFSFJ expert conference on the topic "Preventing loneliness in old age - making an active participation in society possible"*, including an award ceremony and market of opportunities from 18th to 19th March 2019 in Berlin.

At the expert conference, the award winners of the competition were honoured. The expert conference promoted exchange and networking of stakeholders; in five expert fora recent research findings, new ways of meeting people, municipal and European strategies and special target groups were provided and discussed. Practical examples were presented that show how loneliness and social isolation is effectively tackled on local level and how affected persons who are particularly hard to reach can be involved. Representatives from Great Britain, the Netherlands and Poland presented strategies and initiatives from their countries.

There was also a market of opportunities where numerous projects and organisations presented their work.

- In addition to that, BMFSFJ commissioned *two research projects* with the objective of compiling a comprehensive overview of current data on loneliness and social isolation at a very old age (80+). One result of this research project was that the age group 80+ was more affected by loneliness than younger age groups. In addition, with the help of in-depth interviews, information is gathered from people who are over 75 on the meaning of loneliness, their subjective burden and how they personally deal with the subject. In order to prevent and reduce loneliness in old age, it was recommended to promote contact with other people and enable older people to develop stable relationships.
- Building on the existing insights, BMFSFJ is looking into funding a model programme for the prevention of loneliness and social isolation in old age with the help of the European Social Fund. The aim is to promote the development of specialised, age-specific structures on the ground to target certain risk groups, but also the development of further measures that do not reinforce stereotypes of old age but are age-specific and address certain risk groups in a differentiated way. Following the definition of the framework conditions, the launch is planned for the beginning of 2020.
- *Peer Review Seminar* "Strategies against loneliness and social isolation in old age" from 23rd to 24th September 2019 in Berlin. The objective is to facilitate an exchange and discussions of solutions with EU Member States and to find out which strategies and concepts they are implementing, which experience already exists, what can be learned from one another and what can be launched jointly at the European level.

Under the guiding principle "*We take care of those who care for others*", BMFSFJ intends to strengthen and establish connections within society with the help of diverse measures. For instance, meeting places can be created, mentorships established or civic engagement can be strengthened. The approaches by BMFSFJ are diverse to effectively strengthen social participation and cohesion of older people in particular and thus to indirectly counteract loneliness. A few examples are:

- BMFSFJ supports about 540 multi-generational homes as meeting places and places for encounter and exchange for old and young people with the *Federal programme multi-generational centre* (Bundesprogramm Mehrgenerationenhaus). With low-threshold information, counselling and encounter options they provide space for joint activities, facilitate civic engagement of all age groups and strengthen neighbourly relations within the municipality and thus prevent loneliness in rural areas or anonymity in big cities. Last year (2018), more than 61,000 people made daily use of the offers by the homes. More than 33,000 people engage in volunteer work in a multi-generational home.
- The model programme "*Shared housing, self-determined living*" ("*Gemeinschaftlich wohnen, selbstbestimmt leben*") serves to strengthen self-determined living, even with a need for assistance or long-term care, social

participation, mutual support and social cohesion within the residential environment.

The BMFSFJ supports 29 projects, running from 2015 to the end of 2019. These show in an exemplary fashion how community housing with independent living can be successful for older and very old people, even when they need help and care.

There are three funding priorities:

- Independent living of the elderly and very old people in city districts
- Affordable housing, especially for people on low incomes
- A living environment suitable for all generations, diversity and inclusion.

This counteracts loneliness.

- The *Municipality Workshop on Demography* (Demografiewerkstatt Kommunen = DWK) supports municipalities to address demographic change via individual strategies. These can be meeting places, the promotion of participation in cultural life, digital communication, the establishment of a care network to support with everyday tasks or health issues, or being aware of and valuing older people's experiences, for example in the form of a "talk café".
- People in need of long-term care and their relatives will find support and assistance on the ground in 500 *Local Alliances for People with Dementia* ("*Lokale Allianzen für Menschen mit Demenz*") which were set up within the framework of the BMFSFJ federal model programme. Care responsibilities can lead to loneliness: for example, when someone takes care of a person all day long and does not get out of the house anymore. Contact, counselling and easing the burden help escape loneliness. BMFSFJ supports Local Alliances with a network office at the BAGSO.
- The *German foundation for civic engagement and volunteer work* (*Deutsche Stiftung für Engagement und Ehrenamt*) which is to be founded still in 2019 is supposed to strengthen civic engagement and volunteer work in favour of charitable purposes. Its purpose is to address such matters as "services offered to organise civic engagement and volunteer work" and "digitisation" in order to strengthen civic engagement and volunteer structures in structurally weak and rural areas. Especially in these regions distances are greater, often even bus services no longer run. Maintaining connections between people is getting more difficult. The risk of becoming lonely is increasing. That is why BMFSFJ intends to use the foundation to support exactly those persons who are active in these regions.

3 Results

The competition and the expert conference have shown how diverse local civic engagement to combat loneliness and social isolation in old age already is at the moment and how diverse the solutions are. Many good projects and initiatives in eastern and western Germany practically and exemplarily show how affected persons are specifically supported on the ground. Having said that, the expert conference has also made it clear where there is a need for action:

- to promote expert exchange and networking of structures and stakeholders on the ground and within the municipality and
- what is the best way to spread best practice and make it transferable.

It has become evident that the focus on local social and living spaces gives people the opportunity to recognise changes in these local structures and needs of different population groups at an early stage. They can then jointly promote quality of life, participation and social cohesion among generations, people and cultures and life stages, while at the same time preventing loneliness and social isolation. In this context, it is necessary to focus on areas where government action is indispensable.

There is already the comprehensive infrastructure of about 540 multi-generational homes, which can also be used to prevent social isolation. This was reflected in an online survey addressing multi-generational homes conducted by BMFSFJ in June 2018 regarding measures and services for lonely or socially isolated people. The survey aimed to find out which services explicitly address lonely or socially isolated people and/or had a concept which was primarily oriented towards counteracting social isolation and/or loneliness. According to the results of the survey, multi-generational homes consistently address all age groups; this includes young adults (18- to 24-year-olds, 42 per cent) and adults (25- to 44- year-olds, 56 per cent). Approximately 250 multi-generational homes already offer very targeted services for lonely or socially isolated people and about 200 of those intend to expand the existing services. In total, the multi-generational homes reach approximately 11,000 lonely people with about 880 services. In line with the orientation of the work of the multi-generational homes, these are services for all lonely people (no matter whether poor/rich or old/young). Very old people (people 80+) have not been empirically surveyed to a sufficient extent yet. In the future, on the basis of longitudinal studies (follow-up surveys of all German Ageing Survey participants without an age limit) the German Ageing Survey will contain an increased amount of information by people older than 85 years and also on the topic of loneliness.

However, surveying very old people proves to be complex. Such studies require a study concept which is exactly tailored to the specific life situations and needs of very old people. That is why BMFSFJ has commissioned a corresponding study on very old people over 80 which is representative of the population. This study will be jointly conducted with the German Centre of Gerontology and the University of Cologne within the time period from 1st January 2019 to 30th April 2022.

4 Discussion points

Within the framework of the Peer Review Seminar, the following three key issues are to be discussed:

1. *Differentiating between concepts: Social isolation, loneliness and social exclusion*

Social isolation is characterised by an objective amount of social contacts while loneliness describes a subjective feeling of not having the desired quantity and quality of relationships (Age UK, 2018), and social exclusion is the process where people are denied access to rights, opportunities and resources that are normally available to members of different group and which are fundamental for the social integration and the observance of human rights within this specific group. It has been recommended that activities or interventions should avoid exclusively addressing the increasing interaction opportunities for people (combating social isolation), but to also give some thought to the question of how to build and maintain high-quality and meaningful relationships (Care Connect and Age UK, 2018). Therefore, the participants will discuss the following:

- How are social isolation, loneliness and social exclusion understood and approached in different Member States?

2. *Who is affected by social isolation, loneliness and social exclusion? Segmentation of the population: Who is to be addressed?*

The degree of social isolation, loneliness and social exclusion may vary between the different older adult population groups. However, there is some evidence that the country of residence is one of the most important factors for loneliness (Yang and Victor, 2011). Especially in central and eastern European countries there is the highest percentage of older people who report social isolation - with an increase of 15 percentage points for adults of 65 years or older as opposed to people aged 26 to 45 in the same countries. The scope of the challenge in coping with these problems with which the individual Member States are confronted varies depending on the demographic conditions and the availability of resources.

People in bad health, people with disabilities, people with low income, older women (especially single women), migrants and older LGBT citizens (Hoff, 2008, Concannon, 2009) are part of the specific groups among older population groups which face an increasing risk of social isolation and loneliness. That is why there are individual (such as health, income, ethnicity) as well as ecological and social driving forces (such as neighbourhood, services, cultural standards) that cause social isolation and loneliness.

Therefore, the participants will discuss the following:

- Which specific groups of older people in the individual Member States are most threatened by social isolation, loneliness and social exclusion?

3. *National, regional and local policies to reach people*

Against the backdrop of different target groups and life situations there is a range of local activities in order to reduce the risk of social isolation, loneliness or social exclusion. The activities should take into account questions of access and equality in order to make sure that the aspects of social exclusion are not reinforced.

The measures range from individual, family and group to municipal measures and can be promoted by local authorities, municipal groups, employers or non-

profit organisations. Furthermore, strategies for combating loneliness will also have to take future developments into account caused by demographic, social and technological change, urban spaces and disadvantaged rural areas.

The participants will therefore discuss the following key questions:

- How can those older people be reached who are most threatened by social isolation, loneliness and social exclusion?
- Which interventions are available at the individual, family, group or municipal level and what works for whom? Which part can online communication play?
- How can national, regional and local stakeholders cooperate in order to develop solutions?
- How can social isolation, loneliness or social exclusion be prevented?

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