



Responding to change: An investigation into the processes of
rural place-making in the face of ageing incomers

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Executive summary

The current generation of retirees (post war baby-boomers) are a generation who have been at the forefront of radical social, economic and political change. A rising tide of affluent retirees, who may choose to permanently relocate to rural settlements or to enjoy both the city and rural places by maintaining two homes, will cause profound consequences for each society, from the planning and provision of facilities, to understanding of the role and value of older people. The overall aims of the project are to explore: 1) older people's aspirations with regard to social involvement; 2) the impacts of social integration on the rural places to which older in-migrants are moving; 3) the implications of retirement rural migration for local identity-building and place-making.

Conducting two case studies (one in Date City in Hokkaido, Japan and the other in Northumberland in North East England, UK), the project examined the responses of public/private/civic sectors to the challenges and opportunities resulting from the increasing mobility of older people.

In both countries, there is an increasing gap between the needs of older people and the provision of care services by the public sector. To fill the gap, Japan is encouraging private sector investment in creating a "care support industry", while the UK expects the voluntary sector to expand its role in care service provision. In both cases, it is considered important to open up various channels through which older people can get involved to ensure that their voices are adequately heard when services are being planned and introduced as well as in the delivery of the services themselves. Older people's views must be given more respect and outlets are required for such views to be expressed. Such actions can benefit society as a whole, and older individuals themselves.

1 Introduction

The number of people aged 60 and over worldwide will double from 11 percent of the global population in 2006 to 22 percent by 2050 (WHO, 2007). This demographic shift cannot be understood as simply more older people whose values and needs are well known. Nor is the challenge simply one of scale and potential pressure on existing models of health and welfare. The big issue is that the current generation of retirees - the baby boomers (in the Japanese context, the *dankai* generation born in 1947-1949 and in the UK context, the first baby boomer cohort) - are a generation who "have been at the forefront of radical social, economic and political change" (Skidmore and Huber, 2003:11). The adjustments they choose to make in response to retirement and to their own physical change will have profound consequences for each society from the planning and provision of facilities, to understanding the role and value of older people.

Economic pressures in depopulated areas in Japan have led to regional prefectures developing strategies to catch this rising tide of affluent retirees who may choose to permanently relocate to the rural settlement or to enjoy both the city and the rural place by maintaining two homes (known as multi-habitation or *Kōryū-Kyōjū*). Many local authorities in depopulated rural Japan see multi-habitation, and the attraction of new, older residents (even on a temporary basis) as a chance to revitalise their local economies and communities. In the UK, while the in-migration of older people has impacted on house prices and the social make-up of rural communities, there has been no strategic attempt to plan for older people or to see them as anything other than a probable drain on civic resources.

The overall aims of the project are:

- To explore the transformatory experience of baby boomers - their aspirations in retirement rural migration and the impacts of social integration (or lack of it) on the rural places to which older in-migrants are moving;
- To explore leaders and agents seeking to shape (or restrain) this movement;
- To assess the implications of retirement rural migration for local identity-building and place-making.

This research seeks to understand the transformatory process by which these older people impact upon the places to which they move and in turn have their expectations and aspirations shaped by place. In particular, this project assesses the extent to which and ways in which these migrants adjust to their new place of residence, or alternatively try to shape the place according to their needs and expectations, and the implications for their ageing experience and that of long-term residents.

One way in which the interaction between space and people becomes important is through an individual's choice of where to live. This choice may be based on the attributes of a particular space (including a high quality landscape, good local services, or an individual's social network or shared values of reciprocity, neighbourliness and involvement) which develop 'belongingness' to a place that is the foundation of personal identity. Some people may wish to remain in their established location through strength of ties; in-migrants moving into the same place may identify with that place differently to those who are long-term residents. New, possibly contested, identities and methods of place-making will emerge as different social groups emphasise different qualities and frame new narratives of that place.

Depending on their source location, older in-migrants to a rural community may have fundamentally different expectations to long-term older residents about the appropriate level and quality of local service provision. The existence of varying expectations and identities amongst different groups raises fundamental questions as to whether older in-migrants expect to adjust to the place to which they move or whether they expect their destination community to adjust to their economic, social and cultural needs, demands and expectations. Place making in rural areas, at the intersection of socio-economic, environmental and spatial planning, should therefore be understood as "part of processes which both reflect and have the potential to shape the building of relation and discourses, the social and intellectual capital, through which links are made between networks to address matters of shared concern" (Healey 2007: 61). These questions raise important implications for rural policy-makers, planners and residents.

This report draws on the previous investigation and the study report (Murakami et al, 2008) on demographic ageing, particularly the current issue of the migration of the 'baby boomers' in Japan, which was conducted between September 2006 – January 2008. As the second phase of our investigation, in July 2008, 4 members of staff from Newcastle University conducted case study research in Hokkaido (Sapporo, Date and Naganuma) (see Appendix for more details). Data collection was carried out through fieldwork and deskwork: several interviews with local business people in Date; a series of symposiums with prefectural and local government offices, at which academic partners from Newcastle University, Hokkaido University, Waseda University (Japan) and Cornell University (USA) participated; and literature reviews (including materials available on the Internet Web sites) before and after the fieldwork. As the UK case study, between January and April 2009, the Newcastle University team conducted case study research in Northumberland in the North East of England (see Appendix for more details). Data collection was carried out through fieldwork and deskwork: several interviews with local professionals in Northumberland; a community workshop with the members of Berwick University of the Third Age; and literature reviews before and after the fieldwork.

The report consists of 3 main parts: Part 1 discusses the Japan case study (Date City, Hokkaido); Part 2 discusses the UK case study (Northumberland, North East England); and the final section contains overall findings and presents further discussion.

Part 1: Japanese Case Study

2 Overview of Date City

Located on the south western edge of Hokkaido, Date *Shi*¹ is a small town with a population of 37,000 (in 2008). Unlike most local municipalities in Hokkaido, the town's population has been stable over the last decades (Fig 2). This is a rather unusual situation, as most small local municipalities have seen significant population declines since the 1960s. However, the town's population is ageing rapidly in common with other rural municipalities. The town has a good transport connection to the capital city Sapporo and the Shin-Chitose airport by motorway and express train line within 1.5 hours. To the north of the town

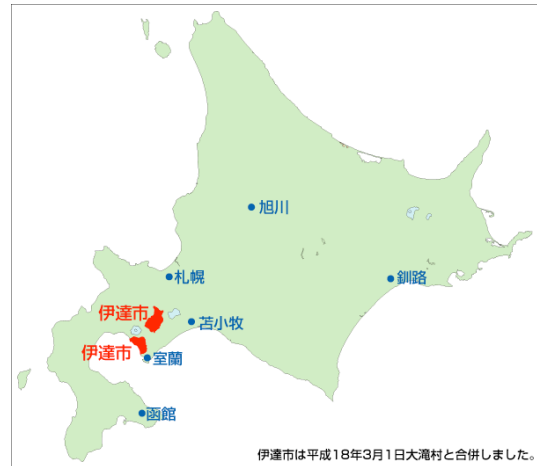


Figure 1: Date City map

there are the Usu Mountains and the Toya Lake, part of the Shikotsutoya National Park, and to the south Date faces the Funkawan bay. It covers a land area of 443.3 square kilometres, including (since 2006) a detached territory of the district of Otani, 46% of which is forests and 25% is designated agricultural land. Most of the residential and commercial areas are concentrated in the downtown area, which covers only 7% of the total land area. It is a compact town surrounded by the mountains and the sea. Within Hokkaido, Date is well known for being blessed with warm weather year round and minimal snow in winter – often called the Northern Riviera (*Kita-no-Shōnan*). With its warm climate and geographic features, Date is a prominent agricultural and fisheries producer within Hokkaido – 'Date Vegetables' are a well established brand.

¹ *Shi* literally means city, but in socio-economic terms, Date is a relatively small town with some rural elements.

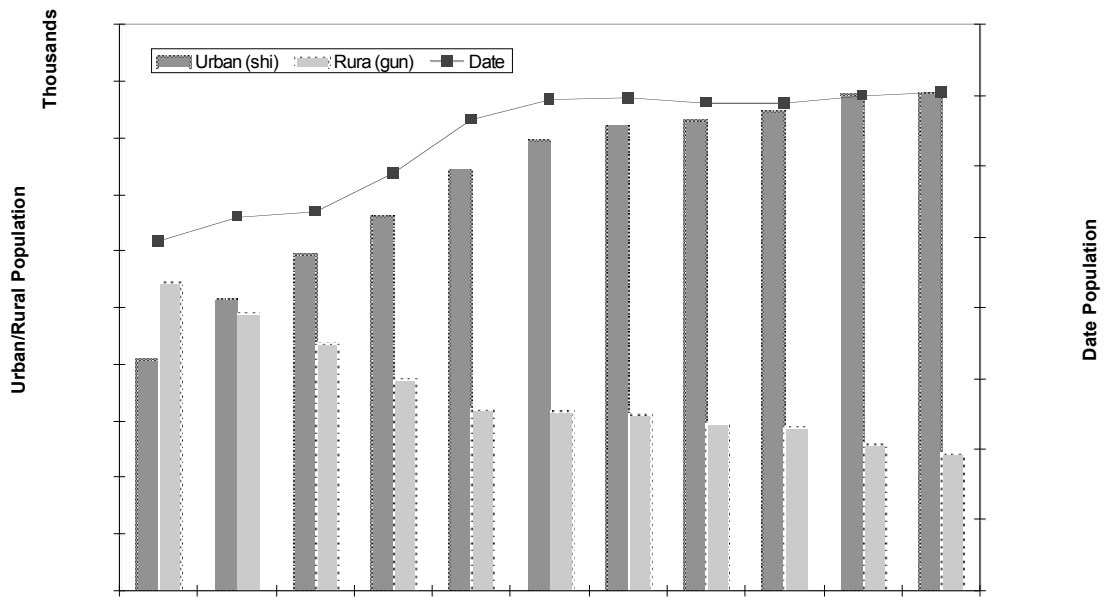


Figure 2: Date population change (source: Population Census)

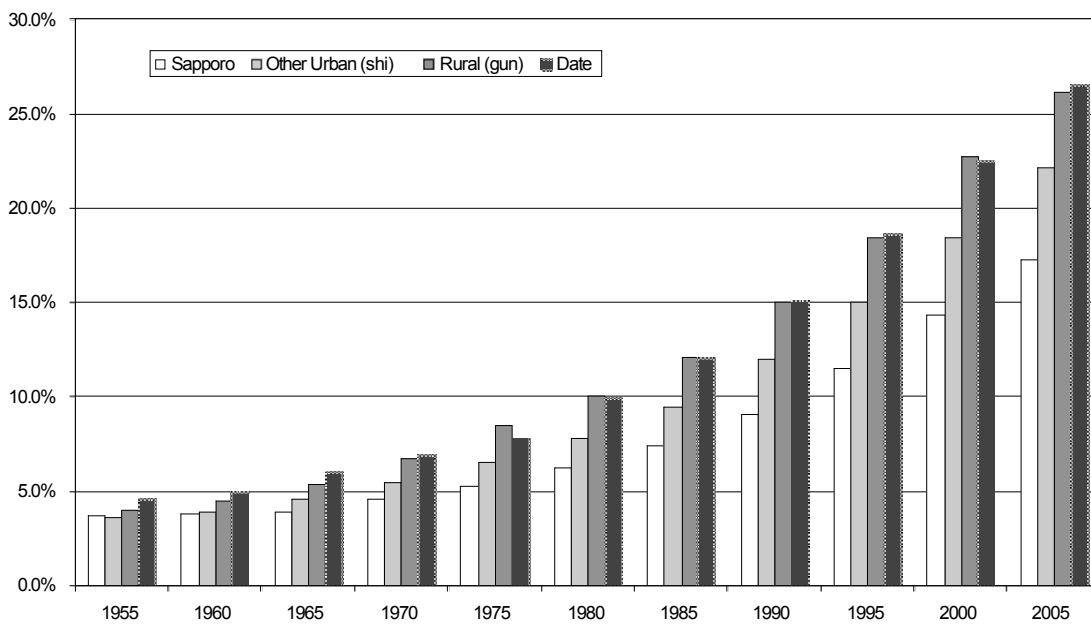


Figure 3: Ageing rate (Source: Population Census)

The town was founded in 1870 by Kunishige Date, the 15th Lord of Date-Watari *han* (feudal domain) and his followers, who migrated from the North East region of the mainland of Japan after the Edo federalism was buried by the Meiji Restoration in 1868. Those *Samurai* who had lost land and jobs on the mainland became farmers in the new frontier and built the foundation of today's Date *Shi*. This history of in-migration seems to continue in today's Date, although in a rather different way. Because of the warm climate, rich natural environment and urban amenities, the town keeps

attracting a significant number of people, particularly retirees, moving to Date from inside Hokkaido and beyond (Table 1). “With essential services such as hospitals, banks, as well as large-scale shopping centres, and strip malls assembled within the compact town centre, the town has become an easy living community”² (Date Shi Council, undated). It is also important to note that in spite of its relatively small population of 37,000, there are more than 350 individuals with developmental disabilities living and working in the town as active members of the community.

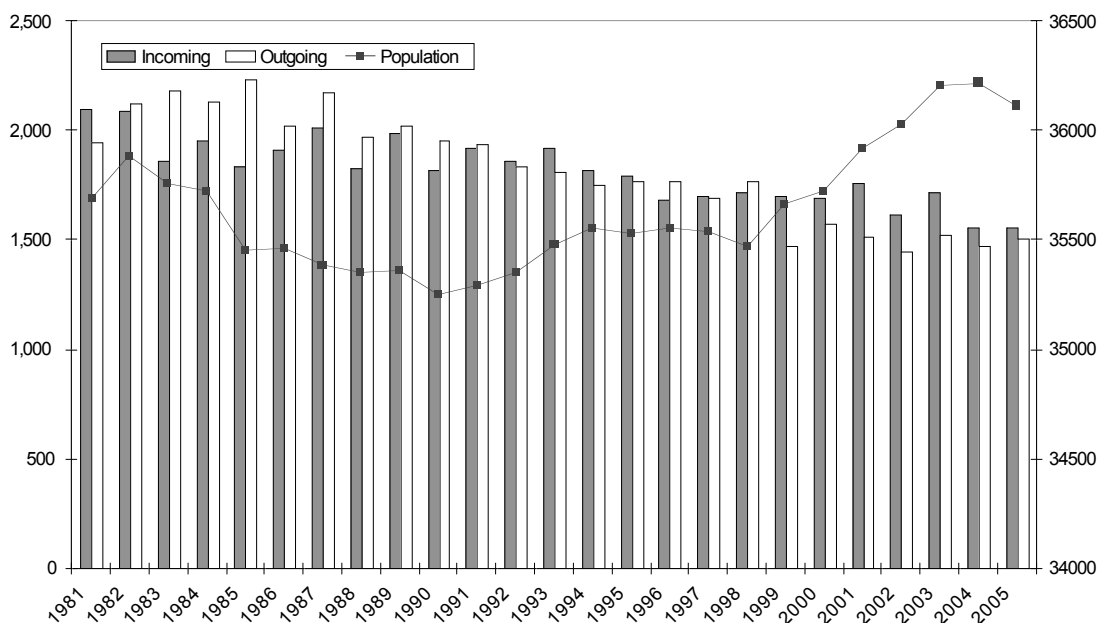


Figure 4: The number of in-migrants to Date (source: Jumin-Daicho)

| Year | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|-----------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| From inside Hokkaido | 1,475 (83.9%) | 1,352 (80.9%) | 1,467 (85.2%) | 1,333 (85.3%) | 1,311 (85.1%) | 1,414 (85.7%) | 1,369 (84.9%) |
| From outside Hokkaido | 282 (16.1%) | 319 (19.1%) | 255 (14.8%) | 229 (14.7%) | 230 (14.9%) | 235 (14.3%) | 244 (15.1%) |
| Total incoming | 1,757 | 1,671 | 1,722 | 1,562 | 1,541 | 1,649 | 1,613 |

Table 1: The number of in-migrants to Date from inside/outside Hokkaido (source: Jumin-Daicho)

The town has developed a social welfare policy, which aims to achieve a society with the principle of normalization (Nirje, 1980), which emphasises programmes, facilities, and life conditions for all people regardless of their age, degree of disability, social background, and education. Starting with support for those with developmental disabilities, the town has become well-known as “a place of compassion and understanding” (Date Shi Council) which it has now broadened to include a strategy for an ageing society - the Wealthy Land Plan. Over the last 6 years, various measures have been implemented including new accommodation for older residents, rural housing development for in-migrant retirees, community transportation services, and internet

² <http://www.city.date.hokkaido.jp/> (accessed on 22 October 2009)

based information sites. These projects have been carried out by private sector investment. In the following sections we examine how Date has achieved this, the role of the municipal government, the response of local businesses and the implications for inclusive communities.

3 Date – the beginnings of a 'wealthy, age friendly' town

Over the last couple of years, Date has drawn attention as a pioneer of an age friendly town³. The story began with the 1999 Mayoral election. Mr Kikuya, a former councillor and convener of the City successfully campaigned with a manifesto based on welfare reform for an ageing population. What was apparent for the local leader was a mismatch between people's needs and housing provision. While an older person lives in a large house alone, a young family with children lives in a tiny crowded flat. People age and the family structure changes and varies, but few choices were available in the town for all citizens. This is not only a problem in Date. Over the last quarter century, the ownership of private homes has increased all over the country (80% of the total households⁴), however, once people buy their homes, they tend to live there for life. Thus, properties in the housing market are mostly newly built, and transactions of second-hand properties are rather small in Japan (13% of the total properties, compared to 77% in the US and 86% in the UK) (Takada and Ito, 2005). The amount of publicly-owned housing has been declining and none of the local municipalities has the finance to build 'transitional' homes for the increasing older population. In 2000, the costs for older people's health and medical care amounted to 20% of the total expenditure of the Date town council, and a reduction in the quantity and quality of care service provision was inevitable. In 2000 financial indicators showed that the 60% of the total expenditure for public services that was covered by the Central Government subsidy⁵, was anticipated to decline as part of the state structural reform. How could welfare reform in Date be achieved with scarce public money?

The forecast of increasing welfare costs for an ageing population and declining incomes from stagnating economic activities, coupled with a shrinking population has been a constraint on the Japanese economy. A radical change was needed. The idea of an alternative welfare system derived from a private study group⁶ chaired by Haruo Shimada, Professor in Economics and a special adviser to the former Prime Minister Koizumi. He was one of the policy brains for the Koizumu administration, which launched the radical policy of structural change. Shimada's idea

³ Date was awarded the 2007 Best Practice of Community Development, by the Ministry of Internal Affairs and Communications [Chi-ikizukuri Somu Daijin Sho] in March 2008. <http://www.soumu.go.jp/c-gyousei/2008/080313.html> (accessed on 1 October 2008)

⁴ www.stat.go.jp/data/kakei/point/pdf/point02.pdf (accessed on 26 August 2008)

⁵ Date City Council, <http://www.city.date.hokkaido.jp/kikakuzaisei/kikaku/n96bln000000d7p5-att/n96bln0000024fdd.xls> (accessed on 3 September 2008)

⁶ <http://www.keieiken.co.jp/aboutus/newsrelease/011009/index.html> (accessed on 2 September 2008)

advocated a new economy based on the welfare-support industry ('seikatsu shien sangyo'), which could be achieved by the deregulation and encouragement of private sector investment in social welfare provision. He criticised the State paternalism, which led not only to an inflexible public sector-led service provision but also prevented the private sector from expanding its business share in the welfare service industry (Shimada and Saitoh, 2004: Shimada 2004). The Mayor of Date town council and some local businessmen were invited to the study group meetings, to consider a wide range of measures to make a shift from the 'welfare state' model to a 'wealthy town' model. The concept of 'wealthy town' that Shimada proposed requires two reforms: a shift from public sector dominance to private sector-led care service provision; and a shift from the despised one-size-fits-all state control to local governance and discretion.

Stimulated by the discussions at the study group in Tokyo in January 2002, Mayor Kikuya decided to set up a local forum called 'Date Wealthy Land Project Study Group [kenkyu kai]' consisting of young local business people from housing, construction, social care services and ICT industries (see Figure 5). At the same time, a cross-disciplinary task force team in the town council was set up to support the Project Study Group. In the following year, members of the study group shared and explored potential ideas and local resources. At the end of two-years, the Date Wealthy Land Koso [Plan] was officially launched and subsequently the study group was re-structured as an operational unit 'the Committee for Creating Wealthy Town' in May 2004 to implement several projects under the plan (see Figure 5 and 6). At the same time, the Date Plan was also authorised as a community regeneration pilot project by the Government⁷, which does not draw any special subsidies but allows the local authority to conduct experimental programmes. From April 2005, four main projects started: older people's homes; new housing development for in-migrants; community transport; and a community internet portal site. These are explained in more detail in the following section.

⁷ 'Chi-iki Saisei Keikaku', a special regeneration programme launched by the Chi-iki Saisei Honbu [Community Regeneration Headquarter], special task force of the Prime Minister (established in October 2003).

<http://www.kantei.go.jp/jp/singi/tiikisaisei/>, <http://www.kantei.go.jp/jp/kouzoukaikaku/flash/> (accessed on 1 October 2008)

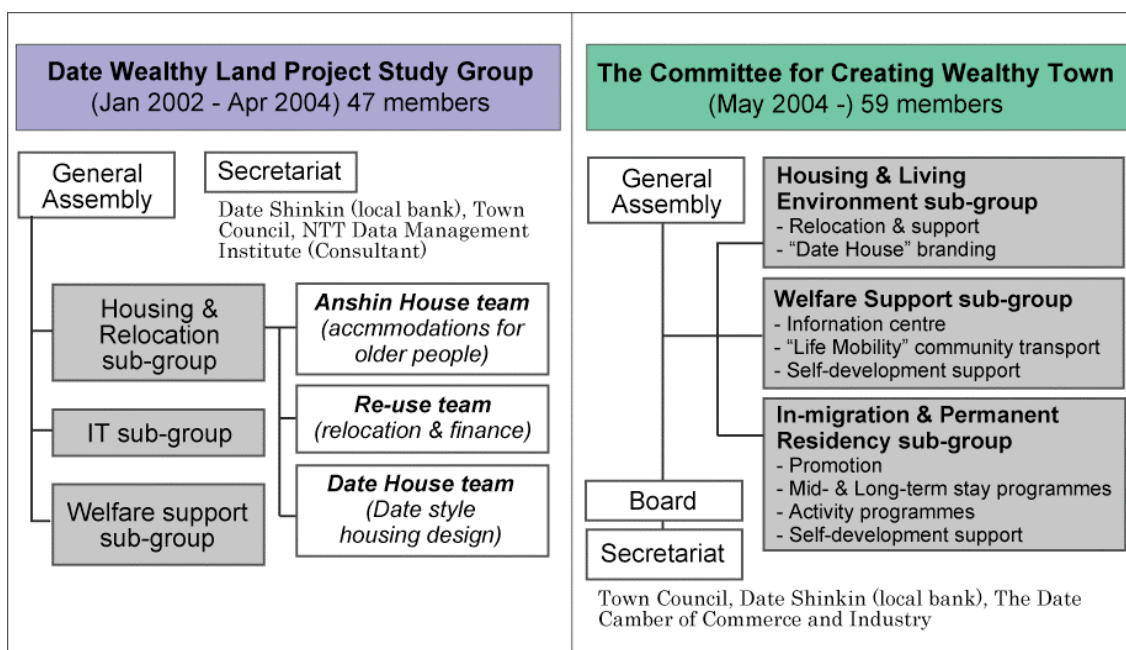


Figure 5: Organisation Structure (source: The Date Town Council)

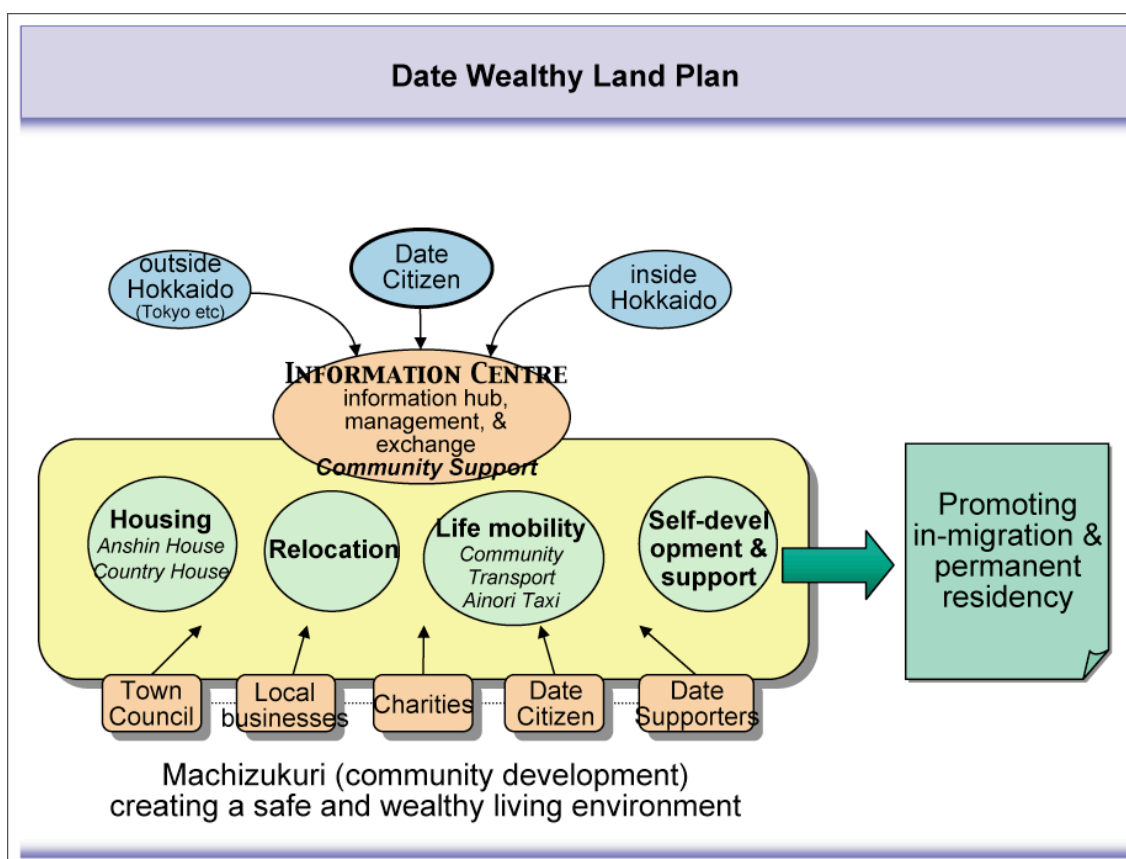


Figure 6: Conceptual Diagram of the Date Wealthy Land Plan (source: The Date Town Council)

It is worth noting that the town's 'wealthy land' policy did not aim to promote the in-migration of retirees at the start. At the time when the policy was developed, the Date population was showing continued growth, albeit only slightly, but it was ageing rapidly, therefore the policy and measures were aimed at improving the quality of life for existing local communities. The wealthy land policy

eventually became integrated with in-migration promotion in 2005, since the council received a number of unexpected inquires from potential in-migrants (retirees) from all over Japan, immediately after the wealthy land policy was highlighted by the media. Nevertheless, this was a secondary objective for the town. More precisely, the policy, in essence, does not differentiate in-migrants from existing communities. A policy officer of the town council emphasised that "many in-migrants are highly motivated and willing to get involved in community activities, therefore the council does not need aggressive promotion." The current policy division of the town council, successor of the cross-sectional task force, is responsible for the wealthy town plan and implementation. They play a 'concierge' role for in-migrants too, but the main roles are to advocate the need for private investments and community involvement, and to facilitate the creation of new local governance for an alternative social welfare provision of the 'wealthy land'.

4 Towards a Wealthy Land Plan

As soon as the idea of wealthy land was introduced in 2001, the study group firstly carried out a comprehensive survey of the needs of older people⁸. The result showed that out of 1,217 responses, 60% were retired and mainly living on pensions. It also revealed that 67% of those who answered the questionnaires were 'in-migrants' to Date at some point, which demonstrates the high popularity of retirement in-migration. The main reasons for migration were 'fine climate' and 'lack of snow'. The major deterrents, such as 'affordable housing prices', 'a range of hospitals and shops' and 'convenient public transport', were rather lower rated. The survey revealed a high proportion of older people living as couples and a small proportion living alone. The level of home ownership was more than 90%. Most of those houses were bungalows or two story wooden housing, and half of these properties were more than 20 years old. A quarter of the respondents were dissatisfied with the current housing conditions, citing difficulties in levels/steps and floor layout and high maintenance or refurbishment costs. Half of residents also found difficulties in accessing various local facilities (hospitals, shops/supermarkets, banks/post offices etc) because of their location, but this was also associated with a lack of investment in public transport, resulting in higher dependency on private cars.

In short, the results of the study clearly demonstrated a conundrum for older people who desired to continue in their own home and neighbourhood but were finding it increasingly difficult to manage, in the face of a lack of housing and transport options. How have these issues been tackled? In the next section, the stories of the development of two housing models - one for older people and the other for in-migrants - followed by local business network, are outlined.

⁸ Date Town Council (undated) A Basic Survey on Older people's Living Environments [Koreisha Kyoju Kankyo ni kansuru Kiso Chosa]. During September and December 2002, questionnaires were sent to 2,000 residents aged over 50. The total response numbers was 1,217 (83% male and 17% female).

4.1 Older people's homes with care



Photos: sheltered accommodation for older people, Date 'Anshin House'.

The first tranche of measures of the Wealthy Land Plan was a housing scheme for older people, the Date Anshin House. The 'anshin [a sense of security, safety and comfort] house' is a housing scheme designed for older people. According to the Foundation for Senior Citizens' Housing⁹, it aims to provide affordable accommodation with appropriate care services for older people with all kinds of needs. The scheme embraces a range of housing: nursing homes, sheltered accommodation, group homes for people with dementia and senior condominiums. The guideline was drawn up to stimulate private sector investment in these types of housing and partnerships between housing providers (private sector), local authorities and social care service providers (often non-governmental public bodies). In a private housing market, luxurious condominiums with a barrier free floor plan and concierge services, and often security cameras or guards have been popular choices amongst affluent retirees, who have a deep dislike of the special housing for 'older people' provided by public sector. The concept of 'anshin house' is the middle point between the two.

The first Date 'anshin house', a senior condominium with a care manager, was completed in March 2006 by a private housing company, Misawa Homes Co., Ltd. with 35 private rooms rented to individual residents. The project cost ¥500,000,000 (£2.5 million) and no single local housing company was able to proceed. Eventually the construction went ahead as a joint venture (led by the Misawa Home). No local developer had any experience of building an 'anshin house'. The second house completed in May 2006 was also built by Misawa Home. In this sense, local housing and construction businesses have not seen much benefit from this project, but at least some older residents began to enjoy their new lives.

Residential priorities are essentially given to those aged over 60 who can live independently. If residents need a small amount of help, they can arrange external support services to visit their homes. Everyday management is provided by an organization Good Life¹⁰ that runs a group home

⁹ http://www.koujuuzai.or.jp/html/page07_02_06.html (accessed on 17 October 2008)

¹⁰ <http://www.gh-owl.com/goodlife.html> (accesses on)

for dementia sufferers next to the property. Individual rooms have their own bathroom and kitchen but the residents also use common space including a dining room, where residents have meals and sometime parties (Karaoke is popular). The whole area is wheelchair accessible. There is a 24 hour communal hot bath, which is very popular amongst the residents. There is a nursing call system from individual rooms, and a night security call system that links to a security company. The monthly room rent ranges from ¥49,000 to 80,000 (£245 – 400¹¹), depending on the room size and floor level. An extra communal maintenance fee for ¥30,000 per month is also required. If residents take every meal it will cost ¥42,000. It is estimated that it costs ¥150,000 (£750) per couple per month (including meals)¹². The price is manageable for those who have a private pension – but rather expensive for those who have only the basic state pension. When 80% of rooms are occupied, the accommodation business makes a profit.

Current residents range from mid 60s to 90 with an equal gender split, though only about a third of all households are living as a couple. Half the residents are long term Date residents while about a fifth are from other parts of Hokkaido and a rather larger percentage from elsewhere in Japan. The residents' motivations to move to this accommodation vary: some moved in because they had relatives living in the town; others saw the advertisements. It was interesting to hear that while the families of the residents want their old parents to live in such a safe place, some residents hesitated at the beginning as they have never lived in a high density block before. Some residents have private cars however, it is not far from the main city centre (15 minutes walk to shopping streets), so those without cars can be independent. The residents also have access to a subsidized community taxi service. Not every resident is sociable but most of the residents enjoy both their private and communal living. Everyday meals and occasional parties in the dining room are the main feature of the communal living. Healthy, nutritious and enjoyable meals provided at the house have been monitored by a former chef, who trains the cooks from the group home too.

The establishment of new housing models for older people (e.g. Anshin house) demonstrates two possibilities in Date: that older people's needs create a new housing market; and the competency of private business as a social welfare service provider. The residents show high levels of satisfaction with the service provided and a real sense of community has emerged in the new collective living. Nevertheless, this is a market for better-off older people, not for those who live on the state pension. One of the members of the sub-group asked himself in the interview, "whether the project is useful for the Date people. The concept of safe and comfortable accommodation for older people with a wide range of care and other services is fine, but it becomes costly. Not many locals can afford them." Ironically, it reveals encroaching waves of a more 'unequal society' (*kakusa shakai*), which seems to be driven by shrinking state intervention and expanding market initiative. This 'absence of the social state' can be seen in most developed countries, with the range of individual autonomy

¹¹ Rate at £1=¥200

¹² Utility bills for individual rooms are excluded. A refundable deposit of 2 months rent fee is required.

being expanded – particularly through consumption. Bauman argues that “[i]ndividuals are expected to devise individual solutions to socially generated problems, and do it individually, using their own skills and individually possessed assets. Such expectation sets individuals in mutual competition.” (Bauman, 2008: 4). Is this situation inevitable? Bauman suggests that as a result, “the middle classes were bound to live in a state of perpetual anxiety, constantly oscillating between brief intervals of apparent safety and its enjoyment and the horrors of approaching catastrophe” (ibid. 9). If this is so, the psychological damage will be significant to the *dankai* generation, who made Japanese society into one comprising ‘a hundred million middle-class people’ (*ichioku so churyu*)¹³,

An estate agent raised a fundamental problem: “since Japanese houses don’t last more than thirty years, building new accommodation for older people is not difficult. There is a large market. However, many older people are living alone in detached houses, most of which are not valuable enough to enable both relocation and some money to bank.” As he points out, building new accommodation for older people does not solve this fundamental problem: the short life of Japanese housing coupled with many older people still likely to be ‘locked into’ home ownership and retaining their faith in it. High-rise condominiums are one of the options in Date, which some older people prefer to other types of housing, as they are based on a ‘national (or urban) standard’ proven by an urban based nation-wide housing company. Here is also the issue that older people have to adapt their lifestyles to what the market offers. Should the market make more effort to offer innovative products to their lifestyles? There seems to be many aspects to consider when creating housing options that meet local needs such as: price, design and type of care services. In our interviews, one local construction company implied the possibility of developing a similar but more affordable and better housing model for older people. Using the company’s own land and property as a kind of social contribution, the rent will be reduced significantly for those who live on the state pension. In this case, the local company as a social landowner could extend their businesses and enhance social networks amongst the local community and care service providers. The point here will be to generate trust amongst the local people which can be crucial in sustaining small, local businesses.

¹³ The phrase began to spread in 1960s and this phenomenon of most of Japanese regarding themselves as ‘middle-class’ lasted until around the late 1990s.

4.2 New housing development for in-migrants



Figure 7: Master plan of 'Denen Sekinai' (left) and an image sketch (right)¹⁴

The "Denen [country] Sekinai" is a housing development project that aims to promote urban people's in-migration to an idyllic rural place in Date. The idea of creating a Date-style housing design was discussed in one of sub-groups in the Project Study Group. Another motivation for this project was the increasing housing need particularly from potential incomers. Although the promotion of urban retirees' in-migration was not a priority of the Study Group, the trend of the *dankai's* aspiration for peaceful and healthy retirement in rural locations has grown and there were several pilot projects in other rural areas in Hokkaido and across Japan, using the 'excellent countryside housing' scheme¹⁵ launched by the Central Government in 1998. To explore a housing design befitting the landscape, climate and lifestyle of Date, an investment was needed, in which many local housing developers and construction companies worked together. This joint-venture approach to housing development was not new for the local construction industry. Over the last decade, some major housing developments were carried out in the town and the lessons learnt from these projects influenced the new rural housing development. In 2000, a rather large-scale development of housing land with 200 plots was undertaken. However this did not contribute to the local economy as much as was anticipated since only 20% of housing contractors were local

¹⁴ <http://sekinai.kitano-slowlife.com/index.htm> (accessed on 2 October 2008)

¹⁵ The Central Government decided to deregulate certain criteria in agriculture laws and to launch a new development model of 'excellent countryside housing' in 1998. This development model initially aimed: firstly, to promote immigration to depopulated rural areas and to make the best use of rural land; and secondly, to prevent disorderly development (avoiding a repetition of urban sprawl) in rural areas. To implement this model, local municipalities are required to draw up a master plan which has to meet the criteria of the existing (revised) agriculture laws, city planning law and building regulation. Once the plan has met the criteria, the development project would be supported by various incentives, for example the buyers of new houses can get publicly supported housing loans (this type of loan is only available once, but second home buyers can apply too); and a 50 % tax reduction on fixed assets for the first three years. Source:

<http://www.maff.go.jp/nouson/seisaku/home/yuryouden/yudenhou-gaiyou.htm> (accessed on 5 September 2008)

and outsiders took most of the business opportunities. This frustrated local businesses. In 2003, another opportunity for the development of housing land with 65 plots, 'Funaoka' emerged, and five local companies swiftly formed a joint venture and their tender was successful. All plots were sold out within three years and 90% of buyers were local people. They won all the building contracts too¹⁶. This demonstrates high housing demand in Date¹⁷, but it seems more than that. In comparison a 60-housing plot development next to the Funaoka, constructed at the same time by 3 contractors outside Date, sold only 3 plots and the rest still remains empty. The key to successful housing development can be found in the Funaoka project. Firstly, the designated area was divided into 5 parts, and each company took responsibility for sales as well as building designs. Secondly, they considered design consistency of the housings and public space creating a harmonious townscape from the individual neighbourhoods. This joint venture was successful in generating both competitive and collaborative relationships between local businesses, as well as boosting the local economy.

After a year of discussion and consultation within the housing sub-group, a new housing development plan was announced in March 2005. Based on the 'excellent countryside housing' scheme, an outline concept and development rules were agreed. A 4.5 hectare plot of land in the town's north farming area was chosen. While the town council prepared the application for changing land-use regulations (the agricultural land needed to be converted to be a housing development plot), the Date Construction Consortium¹⁸, consisting of 12 housing companies and 20 civil engineering companies, began to prepare a tender. This was a new business opportunity for the local construction industry, but a majority of member companies of the Consortium were reluctant to commit to it because of its rural location. Date is a compact town and most residents live in the downtown. Many claimed that there was a low demand for housing in the countryside and this was therefore a high risk investment. This negative view however, was swept aside by a rumour that a major Tokyo construction company was preparing to tender for the development. The Date Consortium decided to submit their tender after all to the town council in Oct 2005. Their bid was accepted and the Consortium started detailing the project. While a master plan with the number of plots, sizes and prices of each plot was straightforward, the process of land-use regulation change and adaptation of the 'excellent country housing' scheme¹⁹ took such a long

¹⁶ The land was owned by the City Council for a primary school development but due to the declining number of children, the Council decided to sell it.

¹⁷ The increasing rate of land price of the City ranked at the top in Japan in 2003.

¹⁸ Date kensetsu jigyo kyoudo kumiai

¹⁹ The conversion of agriculture land into development designated land is said to take on average three years. The 'excellent country housing' scheme was designed for a housing development, not for the development of housing plot. However, in Hokkaido most home buyers tend to buy a piece of land and build a house separately, therefore negotiations between the City council and the Government to adapt the scheme

time that the Consortium's anxiety grew. This was particularly problematic for the local businesses, as they could not even market their project until Government approval was given.

In October 2007, land preparation and publicity for the project eventually began. By April 2008, infrastructure, 53 housing plots, and common space were completed and ready for land buyers to build their own dream homes. The project was advertised all over Japan, through the press, the internet, and various promotion events in Tokyo, Osaka, and Nagoya. It was felt that people were more satisfied with the local municipality backing the housing development: particularly consumers who saw the prices of developed land as appropriate or at least not unrealistic. To attract in-migrants from outside Hokkaido, the Consortium provided a special purchasing back system: it was guaranteed that the Consortium would repurchase the properties (including land) if the owners wish to sell their homes after 10 years. To date (July 2008), 36 units were reserved, of which 28 are from outside Date and 8 are local. A relatively large plot size of 360-700 square metres (average land size for a detached house in Sapporo City is 200 square metres) and the price setting was seen as reasonable by most buyers. The average land price of ¥5,000,000 (£25,000) and housing cost of ¥20,000,000 (£100,000) are not the cheapest options but are at an affordable level for urban dwellers. All those who have bought their plots of land to date are planning to move in as permanent residents, rather than second home owners. One third of families have children and some are looking for jobs locally - the neighbouring city Muroran with a population of 96,000 has more job opportunities and job seekers are likely to find jobs there. The area is designated only for residential use therefore a landowner cannot build commercial property, but a work space attached to the house is permitted. This allows residents to open shops or business in the area. The total number of 15 houses are to be built by the end of March 2009, and at the earliest, the first residents will move in by October 2008.



Photos taken in September 2008²⁰

Although 12 local building companies have been involved in this project, the expectations of each are different. Some are more proactive in seeking business chances in rural housing development

regulations befitting to the local needs were required. In Date's case, a 'building ordinance' was set up as a guidance, which home owners ought to follow.

²⁰ <http://sekinai.kitano-slowlife.com/index.htm> (accessed on 2 October 2008)

but others are more cautious of taking a risk, which inevitably raises tensions amongst the member companies of the Consortium. The anxiety of the latter group stems from inflexible Government regulations attached to rural land-use and buildings, but it also demonstrates the inadequacy of coordination capacity amongst local businesses. Other instances such as the need to achieve a consistency of landscape in the area, which would add extra value to the development as was proven in the Funaoka projects reveal the shortcomings of the partners. The discussions came to nothing because there was a fundamental issue of whose values were to be prioritised.

Some companies were reluctant to force their customers to adapt their ideas of dream homes to one the local rural community would appreciate. This is a particularly important point regarding the values of rural land. Regarding the physical and social design of the area connecting the surrounding rural communities, little attention has been given to how the new development could be integrated with or benefit the existing communities? Scarce public transport in the area, which is one of the major issues facing ageing communities, might be improved by increasing demand from new residents, but "most of the buyers have their own cars and are less concerned with it" (comment given by the director of the Consortium).

Despite the 'excellent country housing' scheme aiming to make the best use of rural land and to prevent disorderly development in rural areas, there is a fundamental question as to whether the Sekinai project would bring any benefits to the local communities. The town council expects a second rural housing project (with 31 plots) next to the Sekinai, if more than 80% of the developed plots in the Sekinai are sold. There is no equal share mechanism amongst the member companies: the more a company invests the better its return will be. What is the best way ahead in this situation? Should all proactive companies lead and coordinate design principles? Should a company promote the Date brand in housing design? How much attention can they pay to social benefits if business performance and profits are to be achieved? Surely it is this way round.

It is difficult to judge what has been achieved through the rural housing model for in-migrants. There are many rural local authorities that are experiencing a declining population and are eager to promote in-migration using the 'excellent country housing' scheme, and lessons from these pilot projects could have improved the Date model. Date's project generated another private-led approach, however, there is no new physical and social design achieved through the development process, which seems to create a dull tone of private initiative – it lacks awareness and sensitivity in creating a new community. Without much emphasis on in-migrants in a policy sense, the local businesses have not considered what new-comers could contribute to the existing local population. Perhaps, they could learn more through the process of building houses with the in-migrants. The second phase is now under the council's consideration and whether the local businesses would like to (or should) proceed will depend on the learning capacity of local construction businesses: do they realise the values and responsibilities of their businesses in supporting the creation of a community, rather than just building individual houses.

4.3 In-migrants and local business & community network

Mr Yoshii, the CEO of the upDate Inc., plays a significant role in creating networks between local businesses, the local authority and those who in-migrate or wish to move to Date. He is himself an in-migrant. After spending a couple of years in Sapporo City, he and his family came to Date in 2001 seeking a better educational environment for his children. His involvement in local communities and businesses was, however, not straightforward. The only motivation for moving to Date from Sapporo was to establish a Steiner School with other parents, who were dissatisfied with the conventional state education system and were seeking alternatives. Although there are a couple of Steiner Schools established in Japan, alternative schools outside the Ministry of Education's control are still very rare. Mr Yoshii recalls that, at the early stage of the School's development, most of those who were involved had been 'persecuted' by local people. It was inevitable as none of Date people knew anything about the Steiner's philosophy and it was often perceived as a kind of cult group. It was also the time when the Aum Shinrikyo, a religious cult group, terrified Japanese Society with the subway bio-gas attack in Tokyo in 1995 and some conspiracies relating to the cult group training terrorists in remote rural areas were heard. The fact that in-migrant families with school age children refused to make their children go to the local school, and that some of them were living together in a colony in a rural area to achieve a self-sustaining community, caused a controversy and brought discomfort to the local community in Date.

When the Yoshii family moved to Date, Mr Yoshii still kept his own business in Sapporo going and did not need to seek a job in the town. However, he met several parents with unique careers and knowledge, and most importantly the energy to take action, and they gradually developed the idea of setting up a new business that could contribute to the local economy and community. With strong support from one of the local business leaders, who is also a trustee of the Steiner School, a handful of skilled individuals established an ICT venture company, Nishi Iburi Cable TV Communications²¹. Several in-migrants with expertise in ICT and business management joined the company. It was fortunate for the company to get the full support of the local business leader (the executive director of one of local construction companies), who had the foresight to create new business opportunities in ICT by drawing skilled in-migrants to the town. The company started a cable TV channel in Otaki district (a rural part of Date), commissioned by the former Otaki village council in 2001, and gradually expanded its business activities to include website development for the municipal government and support services for business venture start-ups providing office space with shared communication facilities in 2003. The company became involved in the business and community network and became well-known to local people.

²¹ A limited liability company

Improving communication amongst local businesses, the public sector and local communities using ICT was one of main objectives for the Project Study Group. A wide range of services and information for the local communities are provided by the town council, various volunteer organisations and local businesses, but these were not well integrated. To achieve the wealthy land policy, a mechanism that could connect existing resources and distribute what users need in a coordinated way was sought. The concept of local information centre emerged from the IT sub-group, a virtual network that connects five domains [see figure 8]: community (daily support given by the city council); health & tourism (by non-governmental organisations such as social welfare councils [shakyo] or tourist associations); business link (by local businesses and business associations); housing & relocation; and in-migrant support. The last two domains are new categories in association with the other sub-groups' activities. This, if achieved, will be a local information infrastructure on which public, private and civic domains and their independent resources are to be shared, and even new partnership activities can be created.

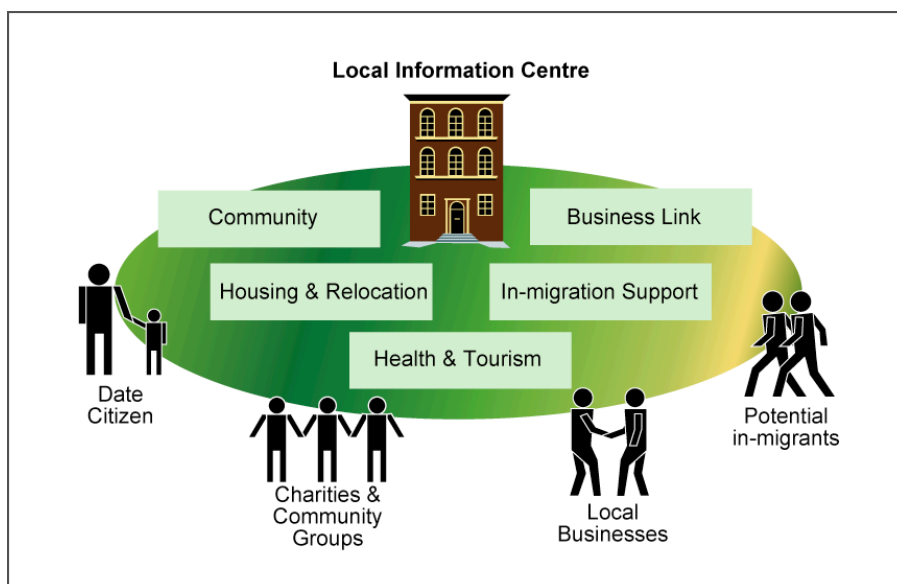


Figure 8: Diagram of Local Information Centre (Source: Date Town Council)

To develop the town-wide information infrastructure, the Study Group commissioned the Nishi Iburi Cable TV Communications company to implement the ideas. One of their achievements is a local community portal site, Musha-Navi (<http://www.mushanavi.com/>) launched in December 2004, which contains advertisements for local businesses, event information and announcements by various organisations (including the town council), blogs by locals (including in-migrants), and special features. It functions as a local magazine posted by individual businesses and organisations, and a social networking site contributed to by those who enjoy life in Date. By March 2008, it had achieved



400,000 pages accessed per month. In parallel with other project developments - the older people's housings, the country housing for in-migrants, and community taxi services – the Musha-Navi has achieved significant importance as a key interface of the Date community and their activities.

As its reputation grew along with the Wealthy Land projects, the company received large equity investments from several local businesses and eventually restructured as a joint-stock corporation, 'upDate Inc.' in February 2006. With an expanded staff of seven (half in-migrants and half local), the new company launched a new online portal, 'Kita no Slow Life [Slow life in the North]' in October 2007 (<http://www.kitano-slowlife.jp/>), particularly targeting those who wish to move to Date. The content of the site has more specific information that tourists and potential in-migrants want to know: places to visit or live, food, local facilities (hospitals, shops etc), community organisations and so forth. It has the best of both information provided by the Tourism Association and by the Local Authority, and more importantly provides more features across a wider region and including private business activities, which public sector organisations do not cover. The latest development by the company is a community free paper, 'Sorami' (<http://www.so-ra-mi.jp/>). A 12-page monthly magazine began to be distributed in May 2008, to the south west of Hokkaido and beyond, including Sapporo City and Chitose Airport. The free paper targets urban consumers and tourists. It features not only local businesses in Date but also links to tourism related businesses outside Date. Surrounded by popular tourist destinations (the Shikotsu Lake National Park, the Tohya Lake National Park, Niseko Ski Resort, Noboribetsu Spa etc.), the magazine promotes the Date brand – not as a holiday destination but as a relocation destination – and stimulates local business activities in a wider context.



One could argue that the power of digital networks to connect people, resources and ideas can drive creativity and innovation forward. However it needs careful consideration to create a better interface. Date's community and business portal site, 'Musha-Navi', functions not only as a local business link, but also seems to generate 'the strength of weak ties' (Granovetter, 1973). Resources and information accumulated within a small group (e.g. different business sectors, associations and community groups) tend to be invisible thus hard to diffuse to and share with people outside the group boundary-unclear. The concierge site for the potential in-migrants, 'Kita no Slow Life', and the brand-new free paper, 'Sorami', provide more channels to stimulate interactive communications between the Date community and the outside world. This type of interface seems to shape local identity/branding, which consequently leads to incubating



new business ideas/opportunities. The company responsible for these media had the miraculous sense to manoeuvre sorry don't know what this means- do you mean they were creative in exploring and exploiting local resources?? in exploring local resources (including local talents) and bringing them together to create new values unclear The governance of the company makes this possible: a private company sponsored by local businesses; the staff consists of half in-migrants with skilled knowledge and half locals with rich local social networks. The company, however, is now facing the issue of making money. Their business activities so far have been commissioned by the public sector, but this is not the case in the future sorry this sounds odd- are you saying that the public sector linkage looks unlikely to continue???. How this can be overcome?

4.4 Funkawan Cultural Institute and its activities

We have found an increasing number of community-based activities in Date. According to the Date Town Council, the number of registered (or identified) community organisations amounts to 190, and about 7,900 participants enjoy their activities. Their purposes and activities vary: from self-help and community support to cultural & health pursuits (hobbies) (see Table 2). There are 12 long-standing volunteer organisations that support the physically disabled and people with learning disabilities. In comparison with this figure, the number of volunteer groups that support older people (mainly those who live alone) is low - 3 groups are identified. Does it mean that community-based support for older people has not been well developed in Date? Interestingly, in contrast, the number of 'old' volunteers who registered at the Silver Human Resource Centre²² amounts to 410. Does this mean that older people see themselves as 'givers'/'providers' rather than 'recipients'? Besides, a wide range of activities provided by the community itself become significant part of the life-long learning in the town. The local municipality provides the venue/infrastructure (rooms, playgrounds) where each community group exercises their own interests, and a networking infrastructure (an annually updated brochure, the list of groups and contacts on the council web

²² The Silver Human Resource Centre [Silver Jinzai Centre] provides temporary work opportunities for people aged 60+. It was started in the 1970s by a local municipality as a separate organisation (Corporation for the Aged), which had both business and voluntary components. National support for this programme started in 1980, and the programme has expanded throughout Japan. As of 2002, there were about 3,730 SHRCs across Japan, with about 730,000 members registered. SHRC members are normally aged 60+, with the same proportion of male and female members. The jobs offered include: cleaning at public buildings, including stations and parks; housework or support at people's homes; community policing; administrative and consulting jobs, for an average wage of 600 yen (£3) per hour. Despite the lower wage, participants tend to enjoy being socially active, and useful to others. In other words, they fill gaps which cannot always be covered by public and business sectors. A growing number of white-collar retirees have joined SHRCs in recent years, and it is now respected as a provider of a range of necessary services for daily living of the older people, and for society as a whole.

site). The latter networking tool appears static and less active than the other business-based networking infrastructure, namely Musha-Navi.

| Categories (no. of groups) : [no. of members] | | (Source: Date Town Council ²³) |
|---|--|--|
| Volunteer (46): [1,938] | Childcare (11), Older people support (3) including 'Silver Human Resource Centre' (410 members), Environmental management (2), Social welfare (17), Cultural Heritage and Tourism Promotion (5), and others (8). | |
| Culture (74): [2,269] | Music (9), Language & Historical Studies (5), Crafts (14), Traditional Performance (3), Art (9), Dance (6), Liberal Arts (17), Others (11) | |
| Sports (70): [3,689] | Football (6), Table tennis (5), Tennis & Basketball (6), Badminton (5), Volleyball (15), Martial Arts (9), Baseball (8), Others (16) | |

Table 2: Community organisations in Date (July 2008)

A popular venue for community activities is the 'Date Institute of Funkawan Culture [Funkawan Kenkyujo]'²⁴, a culture study institute established by the town council in 2005. It was proposed after the Kitakogane Shellmound, a designated national historic site, opened to public as a monumental park in 2001. The institute, as an archaeological study & resource centre, provides academics in various disciplines with artefacts and documentation and networking. It also has a community development centre that provides opportunities for local people to take part in historical studies (seminars) and enjoy contemporary cultural activities (fine arts, painting and music lessons by internationally known artists and musicians). The institute is unique amongst this kind of 'archaeological study centre' in that it accumulates a wide range of cultural (and historical) studies from the ancient times to the contemporary, and aims to stimulate local communities to envisage Date as a place where natural and human activities are harnessed together. It seems to try to capture a constantly evolving story, emerged in interconnected natural, cultural, social and economic environments, by examining the past. One such activity is organisational support for academic societies. Since 1997, the institute hosted several conferences which are often held in university campuses or business convention centres, and the local volunteer group 'Kakehashi no Kai [bridge group]' provides the organisers with a range of required logistics. The benefit of this is to create networks to the academic world and expertise. Highly specialised academic research topics may not have direct impacts upon the people in Date, however, those experts may bring new ideas.

What makes Date so attractive to visitors and those who relocate? Another interesting story that began in parallel with the WLP is the key. The director of the institute, Dr Ohshima, an archaeologist was appointed to help local people in Date to excavate and cultivate the underlying basis of sustainable way of thinking from the Jomon period. Through his leadership and with support from the council, the institute has developed a network of 150 local people who volunteer to maintain

²³ <http://www.city.date.hokkaido.jp/kikakuzaisei/machidukuri/n96bln0000022cbn.html> (accessed on 2 October 2008)

²⁴ <http://www.funkawan.net/index.html> (accessed on 3 October 2008)

the shellmound memorial park, to organise archaeological studies, and to take part in painting classes taught by a retired professor and artist Hiroshi Noda. Mr Noda himself is an in-migrant after his retirement from an art college in Hiroshima. Noda's classes are so popular amongst not only locals but also people outside Date that many students are coming to Date for his lessons. Noda often brings his friends who are well known artists, musicians and writers to Date to give lectures and workshops for local people. A wide range of creative workshops and events are held at the institute, which attract retirement migrants as well as local people. Those who are used to enjoying cultural and intellectual activities in major cities are attracted by these opportunities, through which they come to know and be known by local communities. Driven by Ohshima's idea, Date launched a scheme called the Date supporter club, a kind of fan club, that collects supporters (called 'associate citizen') from outside Date. The members receive a news letter of cultural events and workshops in Date and a box of Date vegetables in exchange for an annual membership fee of 1,000 JPY (£5). Its membership is now more than 1,000 and is growing.

5 Discussion

In the era of a hyper ageing society, current welfare provision cannot be sustained without a drastic tax increase or private sector takeover. The first option expects massive resistance from businesses and citizens, and the second one may be welcomed by the private sector but cause anxiety for those who cannot afford to buy services they need. The Date Wealthy Land Policy began with the second option: private sector-led governance. The new mode of governance is indispensable to the reconsideration of a better model of social welfare provision, though there are still gaps between what was meant to be achieved and what is actually being provided for 'ordinary' older citizens.

Despite the high reputation from outside, most local people (members of the Wealthy Land policy committee as well as citizens) do not think that the private sector-led initiative in promoting social welfare services has been successful. They think that none of three projects (housing development for immigrants, sheltered accommodations for older people, community taxi services) has been useful in improving living conditions for older people. The creation of a support industry, which was one of objectives of the Wealthy Land policy, cannot be achieved by just "a shift from public sector dominance to private sector-led care service provision". The private sector is not homogeneous but split by gaps in business attitudes between different types of businesses and hostilities.

In the following section, we examine how the new governance of Date has been evolving, by analysing social network structure. There are three phases identified: 1) [Planning] January 2002 – April 2004; 2) [Implementation] May 2004 – April 2008; and 3) [Re-Planning] May 2008 onwards. Each phase is presented as a sociogram with mapping of the actors. The discussion then considers

the constraints that prevent a flourishing of the current mode of governance and some potential directions towards a 'wealthier' land.

5.1 A prospect of a new mode of governance

Figure 9 shows the network of the Date Wealthy Land Project Study Group, established in January 2002 under the Mayor's initiative [Phase 1: Planning]. The main driving force was accumulated within the secretariat, which consisted of two key agencies (and the biggest corporations) in Date: the Date Shinyo Kinko (local credit bank) and the Town Council. Appointing the then CEO of the bank as the chairperson of the study group, the steering group consisted of four senior officers in the policy & finance division of the council and three senior officers from the bank, with five consultants from Tokyo²⁵. Various local businesses and business organisations were invited to take part in three sub-groups, but the main contacts (the leaders of sub-groups) were carefully chosen in order to implement what the steering group was planning.

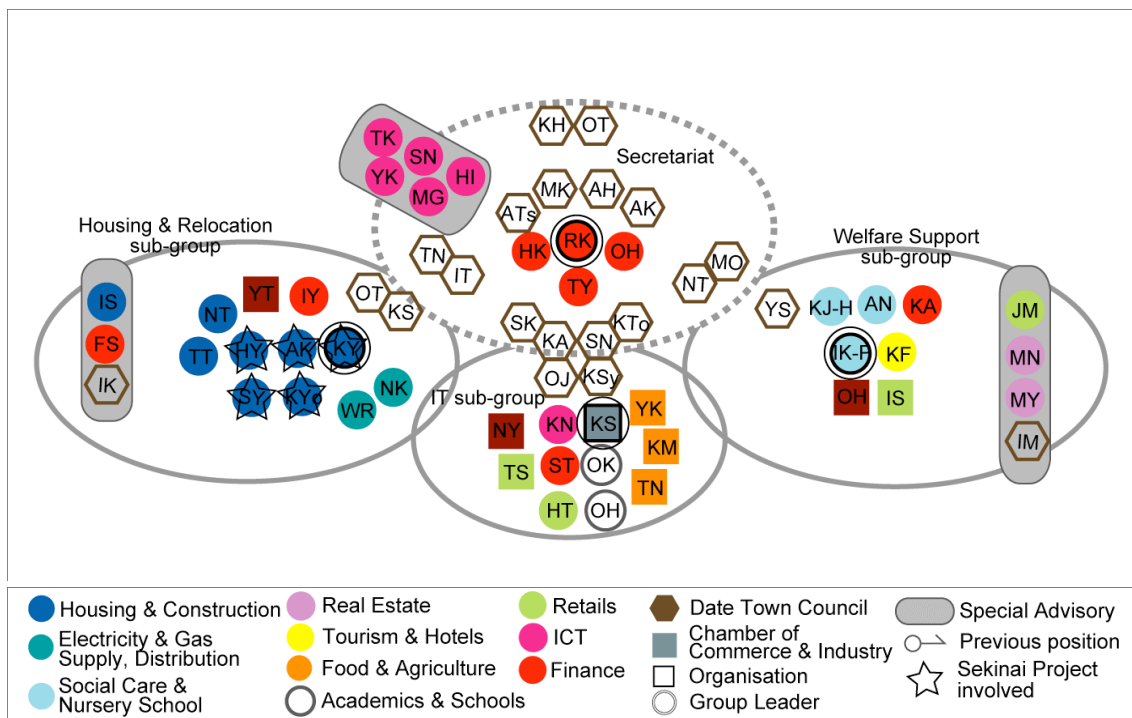


Figure 9: [Phase 1: Planning] the Date Wealthy Land Project Study Group (Jan 2002 – Apr 2004)

The housing sub-group leader was the COE of the oldest construction company in Date, and his company became one of contracting companies of the country housing project, the 'Sekinai'. At the next implementation stage, from May 2004, he took the chairperson's position for the whole group. The IT sub-group was led by the then chairperson of the Date Chamber of Commerce and Industry. This business organisation was commissioning the ICT venture company, which eventually became the upDate Inc., to develop the business link and internet portal site, and leading the

²⁵ NTT DATA Institute of Management Consulting, Inc.

community-taxi scheme since September 2003. These two sub-groups appear well structured with strong leadership; specific objectives that match schemes favoured by the Central Government; and more importantly available project budgets. In contrast, the welfare support sub-group appears, in relative terms, less focused and less integrated with the core secretariat group and other sub-groups. This is rather controversial as the welfare support issue was the key concern amongst members and underpins the Wealthy Land initiative. Welfare support is a broad and nebulous concept and therefore how to achieve it is not clear. More significantly, as soon as main projects (mainly housing development) began, those in care services walked away from the initiative, and there was no space for both sides to exchange expertise to create innovative and useful solutions. Clearly, there was a gap between those who provide conventional welfare support and those who try to create a new 'welfare support industry' in understanding a future vision. At this stage, a private-led and partnership mechanism was developed however, this new governance has a conventional disregard for the 'political existence' of older people in need.

In May 2004, the Project Study Group was re-structured to implement several projects. The Committee for Creating Wealthy Town was set up under the chairmanship of the former housing sub-group leader [Phase 2: Implementation].

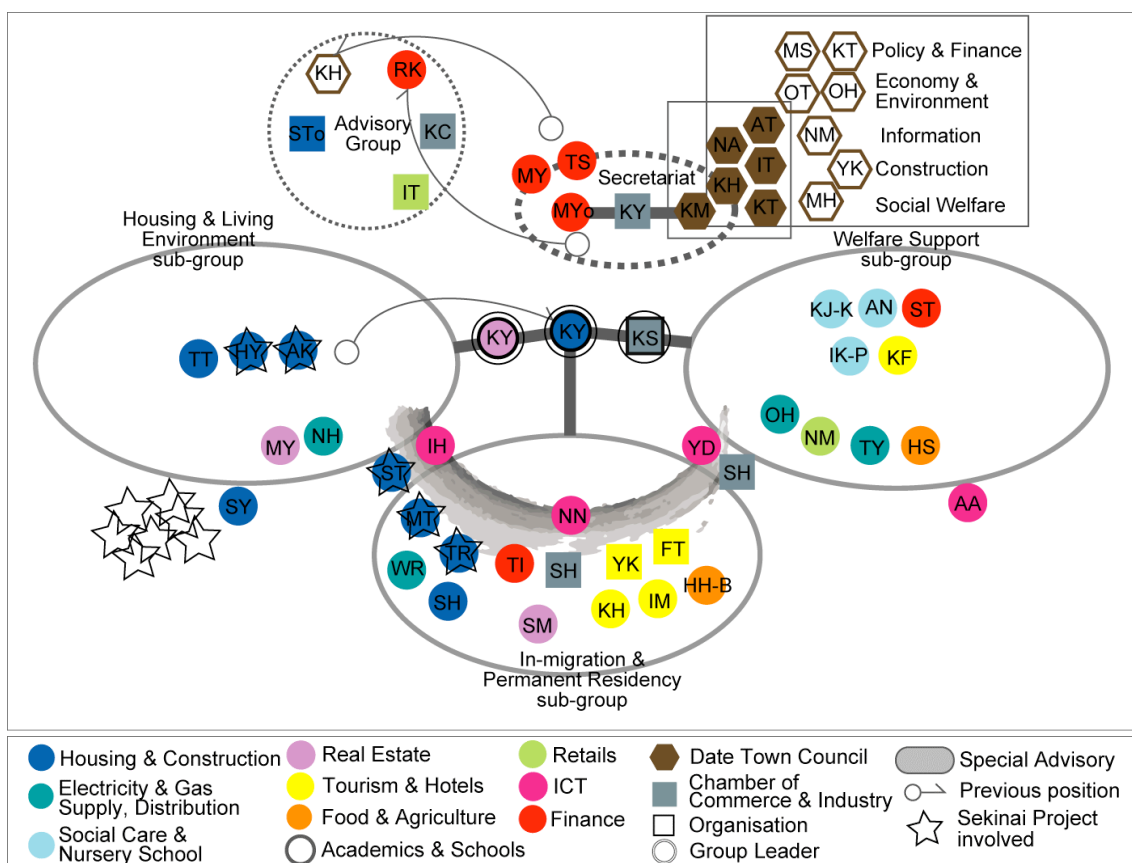


Figure 10: [Phase 2: Implementation] the Committee for Creating Wealthy Town (May 2004 – Apr 2008)

There are three main progressions towards a better governance structure. Firstly, the Committee structure became more private sector-centred, having the secretariat and advisory group

detached from the sub-groups as a backup section, in order to make the public sector's guidance as small as possible and to encourage the private sector to drive their activities. The local bank and the town council are the key players but by this stage, their main roles in legal and financial support were almost determined. Secondly, within the town council, a cross-sectional task force 'Machizukuri' division was set up to bridge private sector activities and legal administration. Thirdly, the former chairperson of the Study Group (the CEO of the local bank) and Mayor became the 'advisory' group with chairpersons from three major business organisations in Date: the Date Chamber of Commerce and Industry (700 members); the Nissen-ren Date [Japan Association of Retails, Date branch] (350 members); and the Date Kensetu Kyokai [association of construction companies] (55 members). This advisory group becomes a strong channel to connect with wider local business communities.

Within the Committee, two sub-groups (housing and welfare support) remained the same and the IT sub-group was replaced by the In-migration & Permanent Residency sub-group, which aimed to enhance the promotion of two housing projects ('Anshin House' and 'Denen Sekinai') by the newly emerged ICT venture company. The housing sub-group was led by a new leader, the CEO of an estate agency, which eventually became the main commissioned agent to promote the condominiums for older people. The in-migration sub-group was chaired by the chairperson of the Committee but substantial activities were driven by three members of staff from the ICT venture company. During this phase (May 2004 – April 2008), all exciting activities seem to emerge around the energy generated by them. However, again, the welfare support sub-group, with a new chairperson from the Chamber of Commerce and Industry and additional members from local businesses, still seems to lack a sense of purpose: what is meant to be achieved.

By spring of 2008, most of designated projects were completed and the Committee was again re-shuffled in May 2008 [Phase 3: Re-planning]. Most of members involved in the first phase have been replaced by younger generations. The previous chairperson became a member of the advisory group, and the CEO of a distribution company was appointed as the new chairperson. All three sub-group leaders were also replaced by younger CEOs of local businesses in housing, electric engineering; and health & food. It is either an interesting coincidence or a deliberate move that all their businesses are associated with 'green' issues: ecology housing, renewable energy, traditional fermentative food and medicines. The rejuvenated Project Committee continues to work on three main objectives: improving the living environment; promoting in-migration & permanent residency; and providing integrated social care services for people in need. The first two sub-groups are expected to advance their projects, while the third needs further integration of dispersed information and available resources to enable all citizens to access these services more easily. The intention to invigorate the latter sub-group was seen in the positions of two core staff from the UpDate Inc. However, the sustainability of the company is at risk. Members of the UpDate, who were expected to play other crucial roles from 2008 onwards, to connect the social welfare service sector and others to achieve the original goal of the initiative, also seem to have stepped down

from the initiative. The ICT group and its innovative activities to connect individual businesses, people inside and those from outside and the private and public sectors, are highly valued amongst all, but the cost of running this role doesn't seem to be met by its current advertising revenue – Date is not big enough to make money out of this.

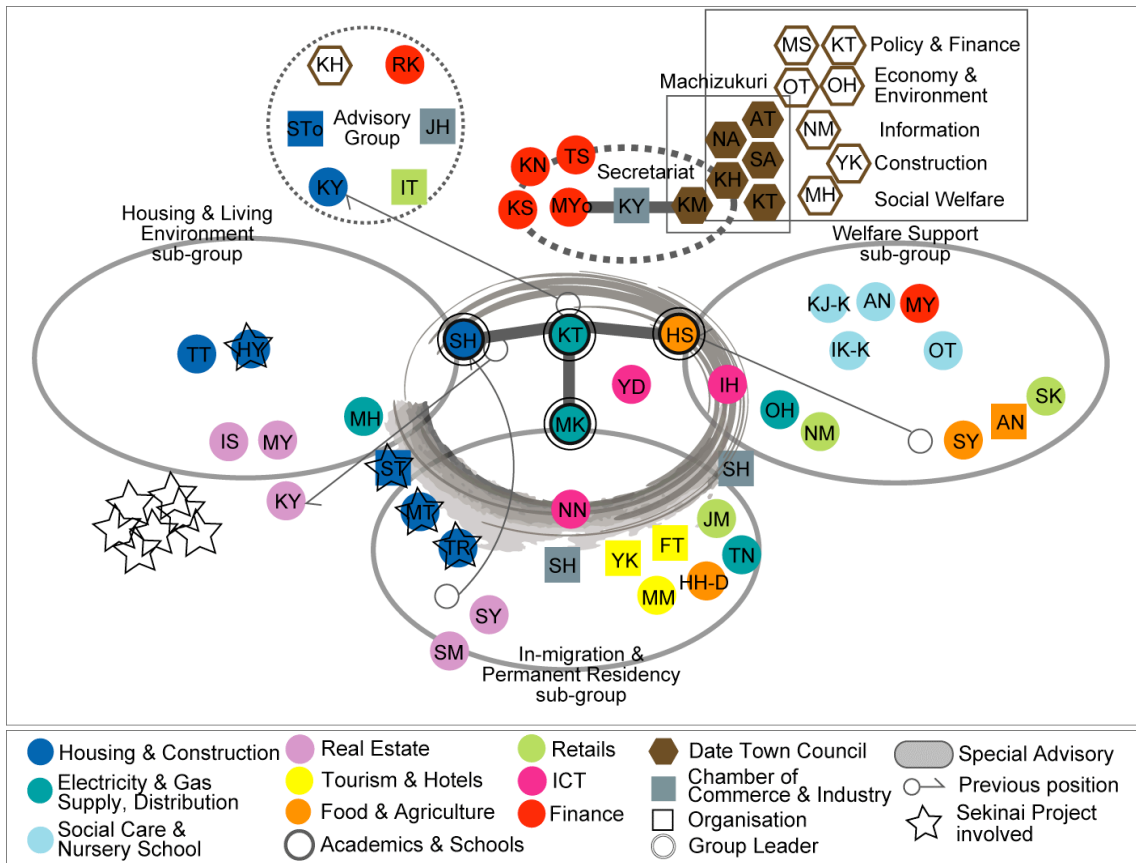


Figure 11: [Phase 3: Re-planning] the Committee for Creating Wealthy Town (May 2008)

Over the last six years, the governance mode has shifted from a public sector-led top-down to a public sector-centred partnership approach. Nevertheless, the initial purpose of the partnership to 'create a welfare support industry and a wider range of choices for users' has not yet been fully achieved. Some sectors (mainly housing and construction) have enjoyed business expansion, but it has not yet reached the core problems (affordability of new types of accommodation and lack of incentives of relocation for older residents). These issues need to be tackled with a longer-term vision. Here there are three concerns.

Firstly, concerning the stability and legitimacy of the partnership. The policy and associated partnership organisation exist on an 'ad-hoc' basis and there is no lawful/legal legitimacy to continue at the moment. Unlike the Community Plan in Scotland and the Community Strategies in England, the Wealthy Land policy itself is, technically, an 'informal' plan, which has no legitimacy for the local authority or any organisations (private sector, voluntary organisations) to follow. The cross-sectional task force [community development division], set up within the town council for the implementation of the policy, is an 'authorised' organisation by the current Mayor's personal

authoritative pronouncement (what is called in Japanese 'tsuru no hito koe'), but this might be disbanded in the future if political will changed.

Secondly, the Project Committee, the main driving force of the Wealthy Land policy, consists of local businesses who take part in activities in a voluntary manner. Their activities may continue as long as they see this partnership as a business opportunity, but there is no certainty or legitimacy for the private sector to keep initiatives in the social welfare field. Some businesses have valued that their different businesses have different interests and business ideas, from which they could learn. The initiative has generated this learning space but few businesses benefited from it (such as housing related businesses). It was also heard from businesses that there was a deep-rooted dependency on public subsidy in small towns and villages in non-metropolitan regions – the first phase (2004-2008) got several grants from Central Government to implement projects, but the second phase (2008 onwards) has received none, which has dampened enthusiasm amongst businesses who take part in the initiative.

Thirdly, the absence of ordinary citizen in the process of shaping this new mode of governance: there is no way for ordinary people or the volunteer sector to take part in and take responsibilities for visioning and implementation. This situation could be understandable in the current wider socio-political context that is: the public sector is (it is believed) still responsible for and has control over people's social welfare. The scale of local business activities is rather smaller and, thus, the capacity to invest in a new market is lower than in large urban areas, even if there are relatively high growth expectations. Older people themselves do not fully understand the possibility that their needs and aspirations can modify the way the social welfare system works which might reflect the scale of volunteer activities in the social welfare field in Japan.

5.2 Towards a wealthier land

What lessons could be learnt from the Date experiences? Firstly, the importance of changing understandings/stereotypes of groups (e.g. older people, in-migrants the disabled). Secondly, the role played by 'key' individuals in innovative ideas, driving change. Thirdly, the successful integration of policies/initiatives/projects focusing on in-migrants and older people. Fourthly, the role of the private sector, working in collaboration with the public sector (to varying degrees), leading change. Finally, the integration of the networks of in-migrants and locals (barriers to this and benefits).

The continuing trend of in-migration is a rather fortunate condition for Date communities. How can locals capitalise on this and make the best of it to create a wealthier living environment not only for current older people but also for future generations? Date has built a unique policy and partnership for an alternative social welfare provision, which may be a foundation for the future.

Drawing on the current Project Committee structure, several groups of actors who have not been involved in the movement, and some potential topics that the Committee could pursue in the next couple of years are identified. Through building partnerships with those new actors and pursuing new projects, the institutional capacity of Date's welfare provision will be enhanced. In the following sections, we will discuss four key words: network, concierge's roles, food and environment, and community engagement.

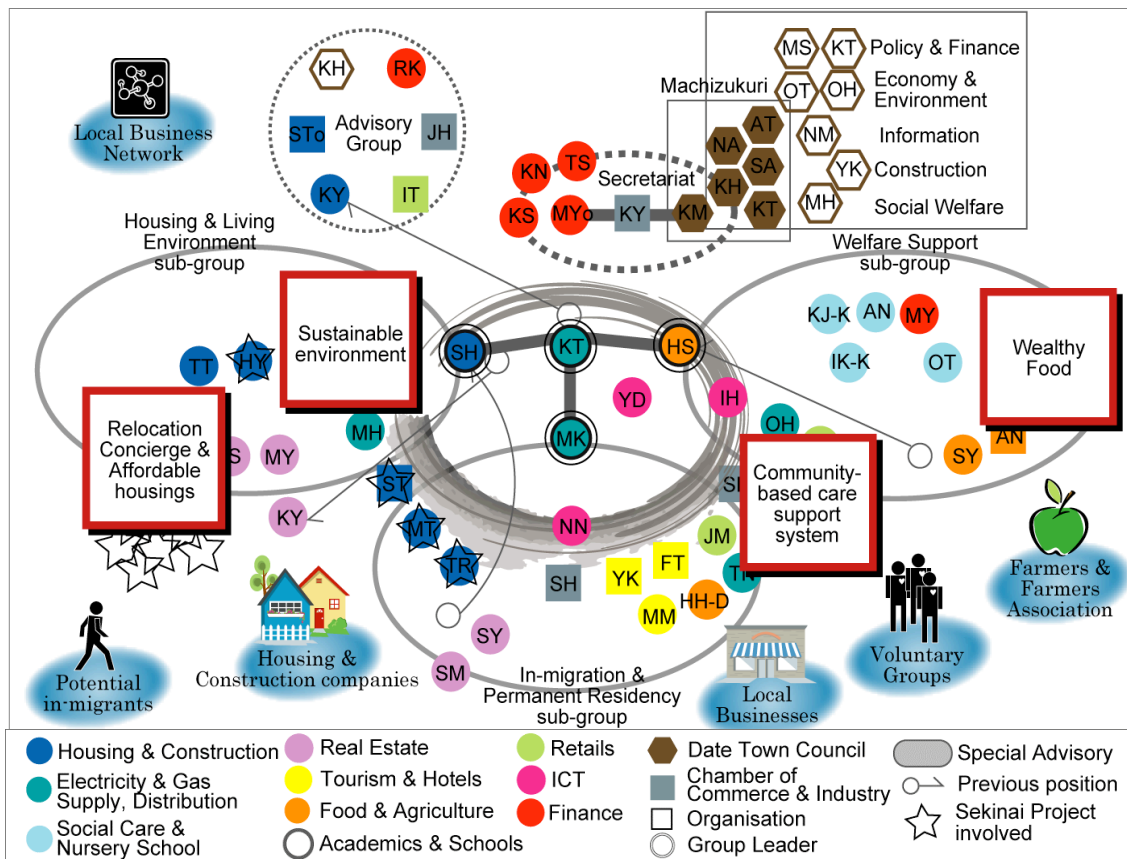


Figure 12: The Project Committee and other actors

[Network] The continuing trend of in-migration pushes up housing demand, but new business start-ups in estate agency and construction companies have not been seen in the area. Indeed, our interviewees did not see much potential for retired in-migrants to establish businesses. Unlike the UK and US cases, are Japanese retirees less interested in businesses that could support their later lives? Despite the successful business model, Mr Yoshii claimed that “Date keeps attracting in-migrants, particularly retirees who have enough pension, and therefore they are not keen on making money. There is an increasing number of part-time job opportunities and volunteer activities in the social welfare sector, which will satisfy those in-migrants who would like to be engaged socially and economically.” He also claimed that “there are few opportunities and possibilities for in-migrants to start businesses in Date. Except the Date Shinkin [local credit bank] and the town council, most local companies are micro-businesses (with less than 10 employees) including agri businesses”. This is partly because of “the interlocking structure of ownership and the long-term relationships between suppliers, distributors, and banks” (Krugman, 1992: 119), which makes it hard for newcomers to break into the network, meaning that success is less likely. In the agriculture sector,

the land-use regulations and the complex farmer registration process makes it difficult for non-farmers to enter the sector. In terms of business start-ups, ICT businesses are footloose, and Date City is not necessarily the best place for start-ups. In Mr Yoshii's case, there was another reason to be in Date (the Steiner School). He pointed out the keys to successful entrepreneurship: to seek a niche in the local business market; not to compete with local businesses as it damages the relationship between locals and the newcomers; and to find a local partner who can open the gate to social networks.

The development of new governance structure of the Wealthy Land initiative clearly "resembles an elaborate boys' network" (Krugman, *ibid*). However, this has to be more open and accessible to potential business sectors. At the interview, My Saijo, who is the leader of housing sub-group, told us the importance of 'marebito', people coming from outside. "Local people are often dazzled by the urban illusion. 'Marebito' disillusion us, and in fact my company's policy has been influenced and changed in a better way". The term 'marebito', coined by Shinobu Origuchi, an ethnologist, refers to a kind of god in ancient times who comes to a village and blesses villagers or makes predictions, wishing for a good harvest, making it rain or getting rid of bad luck. In modern times, 'marebito' refers to (unusual and often unwelcome) visitors/travellers but its values still appear to be appreciated. Through the process of learning from and networking with people who pursue 'alternatives' in lifestyle, agriculture, and education, My Saijo has sympathy with groups of people who are not well integrated into the Date community (such as the Steiner community). Born and bred in Date, he has also been one of the core members in the local community, and is aware of the distinction between the local and the outsiders/incomers.

[Concierge's roles] Mr Yaegashi, who has been involved in the very early stages of the Wealthy Land initiative and recently opened his estate agency company in Hakodate City, is seeking another concierge role model as an estate agent. The roles of a concierge for potential in-migrants, he thinks, are to consult on a lifestyle that the in-migrants imagine, not to give information only about housing. Hakodate City, one of oldest international ports opening to the world at the Meiji Restoration in 1868, is a popular destination for tourists and in-migrants outside Hokkaido. Its nostalgic images, exoticism, and famous port night view particularly excite the dankai generation. Indeed, Hakodate City has attracted many enquiries from the urban retirees who wish to relocate to Hakodate. However, "they don't seem to understand the realities and the socio-economic conditions of the City", Mr Yaegashi claimed. Due to its geography, at the south west end of Hokkaido island, the city has lost economic power in parallel with a shift of transportation mode from ships to motor vehicles. The City's population is the third biggest in Hokkaido but keeps declining as a result of the failure of economic restructuring and dependency on the tourism industry. Mr Yaegashi, as a local estate agent, argued that in spite of its popularity as a tourist destination, Hakodate is not necessarily a desirable option for some [retirees] in-migrants.

"I advised one client, a retiree from Tokyo, who originally looked for a property in Hakodate, to change the destination. He was planning to start an ICT business in the place to which he moves and we discussed what he would need in everyday life and to set up his business. We concluded that Hakodate, his first choice, would not be the best choice and he eventually decided to stake his future on Date." If Mr Yaegashi was a conventional estate agent, he would have just introduced properties matching his customer's images and choices. Yet his client would be struggling with lack of support for business start-up, and eventually might give up his dreams and return to Tokyo. In fact this is not an unusual case. Mr Yaegashi examined the trends of participants of the 'short-stay testing' schemes: "they vary in what they expect in Hokkaido and how much they are determined to relocate. Some just enjoy longer holidays and others seriously check up every corner of the area. The latter is less likely to find a place where their narrowly defined dreams come true. Therefore, in both cases, it is important to consult them on the potentials and feasibilities". He also pointed out that "many retirees who wish to relocate to Hokkaido are highly skilled and motivated. So I would like to encourage them to make the best of their skills and talents in business. In doing so, I also encourage local companies to open job opportunities to those old skilled in-migrants. I don't think those in-migrants value properties themselves. They are concerned about how they live. The local estate agents must give appropriate support and information." His concierge business does not generate immediate income (he charges nothing for giving useful information), however, it will increase the company's reputation and, in the longer term, it will help in-migrants to stay and, in some cases, to get involved in business activities.

[New Food Culture] In terms of the development of the 'Wealthy Land' concept, the new Project Committee emphasises 'food' related activities in all sub-groups. It brings a chance to re-examine local resources which exist but are not recognised as 'valued assets', such as the agricultural industry and farmers, the rich rural nature and urban green space. Perhaps these resources are most valued by people from outside. In fact, many in-migrants appreciate the quantity, quality and variety of local food and nature as the best charm of Date, for instance, the area produces 70 varieties of vegetables known as 'Date Vegetables'. These are perhaps not as glamorous as the tourist attractions that other areas can offer, but they are highly valued in association with healthy eating & living, food safety, and local produce local consumption [chisan chishyo]. These local resources discovered by outsiders are also valuable for locals. Good food gives us peace of mind.

[Environment] Some ideas to expand local businesses are already emerging along these lines. A housing company is planning to develop an eco-village in the downtown. It is a small scale project with 4 or 5 households on a 0.3 hectare piece of land, however, its approach will have impacts on the housing industry in the city. If completed, it will be the first eco-village in Hokkaido. Being aware of increasing consumer concerns about 'sick building syndrome'²⁶ and eco-consciousness, the

²⁶ Multiple chemical sensitivity, a condition in which various symptoms reportedly appear after a person has been exposed to any of a wide range of chemicals.

company has been investigating needs and expertise in eco-friendly allergy-free materials, agriculture, and community development. As seen in the Denen Sekinai (rural housing) project, many local people, however, find the investment in eco-village nonsense and risky in Date, where people live in a 'Gemeinschaft' like society – in a backward and negative sense. Mr Saijo, CEO of the company, in contrast, takes a sceptical view of what the Denen Sekinai project tries to achieve. "Regarding the exterior design code, they discussed ridiculous ideas of bans on having domestic animals and using fertilisers that will cause conflicts between the residents. It is located in a rural setting, where many farmers use fertilizers every day! They [the companies involved in the project] wanted a suburban development that they believed attracts the urban dwellers." Despite the unpopularity of the idea of the eco-village amongst peer companies, he has made effort to promote the project, within the city and beyond with many outsiders' help, providing seminars and workshops on eco-housing, permaculture, agri-tourism etc. By July 2008, three families had signed up and the project was about to begin. This is not a desired situation with a lack of participants though, Mr Saijo decided to take off for a long journey with his clients, through which they hope to attract their followers. Each family has different ideas and interests: a family from Kyoto are high-technology believers and wish to build the ultimate eco-friendly home; a family from Tokyo are experienced growers wishing to produce wines and beers to serve at their B&B business; one family is a local shop owner wishing to open a branch at the eco-village. To make all their ideas happen in an integrated way is not an easy task and it will not make much profit for the company in a normal sense. Yet, this approach is what the construction industry has dismissed: the local housing company facilitates the generation of a sense of community, not only within the eco-village but also within the wider Date community.

[Community engagement] Volunteer activities and local cultural knowledge have become richer and richer. Ohshima will retire in 2 years and envisages creating a community development organisation that keeps activities amongst local communities (including migrants) and enhances networks outside Date. Following the Date cultural institute, neighbouring local authorities have also established similar organisations and these are to be connected to enrich local resources from the past into future.

The dynamism and attractiveness of Date seem to lie in links between a formal, project oriented network (i.e. The WL initiative) that aims to achieve economic success and informal, culture driven volunteer activities (i.e. a number of volunteer bodies established through the Culture Institute). However, what has been neglected in Date is the need to connect these links in more effective ways – perhaps due to a lack of resources (human and financial)?

Part 2: UK Case Study

6 Overview of Northumberland

North East England is the smallest region in England in terms of population size (2,555,700 in 2006) (North East Assembly, 2007), comprising the combined area of Northumberland, County Durham, Tyne and Wear and a small part of North Yorkshire. North East England has come through a period of socio-economic restructuring over the last half century. Driven by European and global logics, the composition of industries has experienced a shift from branch plants in often nationalised industries to knowledge-based services and consumer services (Charles and Benneworth, 2001). In recent years, while the working age employment rate increased from 66.5% to 70% (between 1996 and 2004) and the number of jobs increased from 1,054,000 to 1,116,000 (between 1996 and 2005), the North East has been one of the slowest growing regions

in England and levels of prosperity are now among the lowest in the country (One North East, 2006). The principal city is Newcastle with population of 270,500 in 2005, where heavy industry once dominated, but the city is now re-inventing itself as an international centre of art and culture and scientific research (for example, through the Science City initiative²⁷).

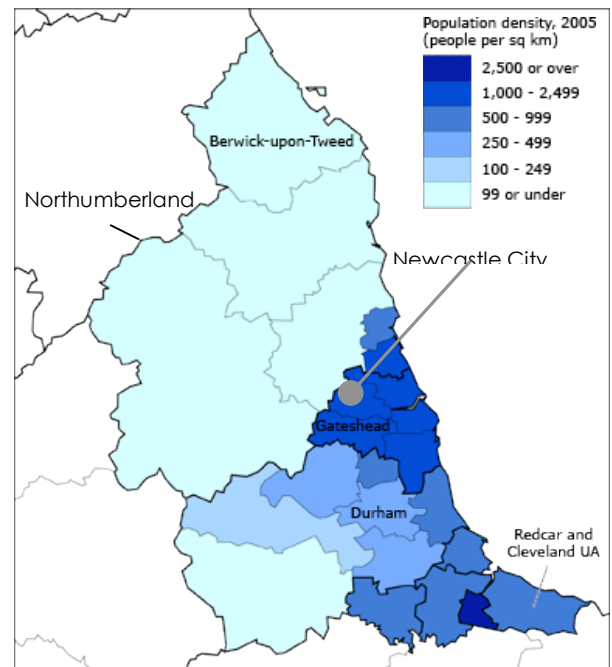


Figure 13: Northumberland Map

Source: <http://www.statistics.gov.uk/> (accessed on 29 Jan 2008)

²⁷ <http://www.newcastlesciencecity.com/> (accessed on 14 December 2007)

| | North East England total | Newcastle City | Northumberland County | Berwick-upon Tweed Borough |
|--|---------------------------------------|----------------|--------------------------|-------------------------------|
| No. of local municipalities / Type | Unitary 10 County 2 District 13 | Unitary | County | District |
| Area Sq.km | 8,592 | 113 | 5,026 | 972 |
| Population (%) | 2,558,000 (100) | 270,500 (10.6) | 309,900 (12.1) | 26,000 (1.0) |
| *Population projection 2016 | 2,589,800 | 281,500 | 324,200 | 27,400 |
| Age Group** | 0-14 (%) | 17.1 | 15.8 | 13.8 |
| | 15-64 (%) | 66.1 | 68.9 | 62.7 |
| | 65+ (%) | 16.9 | 15.3 | 23.5 |

Source: http://www.gos.gov.uk/gone/ourregion/local_authorities/ (accessed on 28 Jan 2008)

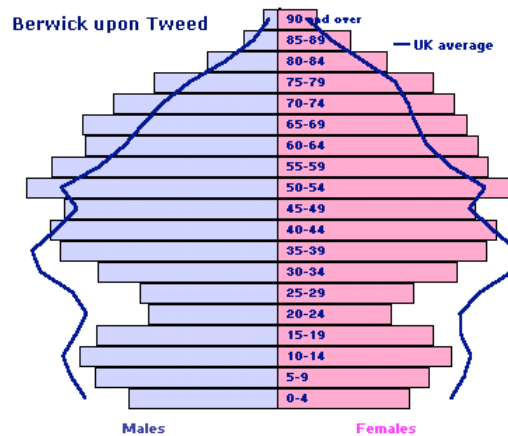
Note: *Source: 2004-based English sub-national population projections, Office for National Statistics, updated December 2006, **Source: Registrar General's Population Estimates for Mid-2006, Office for National Statistics updated August 2007. Totals may not sum due to rounding.

Table 3: North East England spatial distribution of population, 2005

Located in the northern part of the North East region, Northumberland is the sixth largest county in England by size with a land area of 1,940 square miles, but is one of the smallest by population (307,190 at the 2001 census). Forty-six percent of the Northumberland population lives in urban districts²⁸. In comparison the rural districts of the County are very sparsely populated (0.34 persons per ha). The majority of the population lives in the market towns of Alnwick, Berwick-upon Tweed, Morpeth and Hexham together with a small number of towns and villages. These towns have become centres of activity supplying services, job opportunities and community facilities for the rural areas of the County (Northumberland Housing Board, 2007: 5). The population of Northumberland in 2005 was 309,900 and increasingly the County is seeing a shift towards an ageing population.

Berwick upon Tweed is the northernmost town in England, situated 2.5 miles (4 km) south of the Scottish border, in the county of Northumberland. The population of Berwick Borough in the 2001 census was 25,949, of which 21.2% were people aged over 65, which was markedly higher than the average for England (15.9%) (see Figure 14). Within the Borough, 59.5% of the population was employed and 3.6% unemployed, while 19% of the population was retired in 2001, reflecting the high numbers of older people. Slightly more than 60% of the population was employed in the service sector, including shops, hotels and catering, financial services and most government activity, including health care. About 13% work in manufacturing, 10% in agriculture, and 8% in construction.

²⁸ Blyth Valley and Wansbeck, covering only 3% of the area of Northumberland, in the South East of the County.



Source: National Statistics

Figure 14: Berwick upon Tweed Population Pyramid 2001

7 Emerging Unitary Authority

In July 2007, the UK Government announced that it was going to make changes to the organisation of local authorities in Northumberland. A two-tier system existed at the time, consisting of six district councils and one county council. The Government argued that creating one unitary authority responsible for all public services would make service delivery in Northumberland simpler and more cost-effective and would reduce bureaucracy and duplication. As well as the financial arguments made in favour of the creation of a 'new unitary authority', those in favour of the change argued that local people would have more say about how services are delivered, and that having one authority would give Northumberland a strong voice both regionally and nationally. However, arguments against the creation of the unitary authority and the abolition of the district councils include a loss of flexibility at local level and greater remoteness from local people.

Elections were held for the new unitary authority in May 2008 (resulting in a large fall in the number of councillors for Northumberland) and the new authority officially came into being on 1st April 2009. The creation of a new authority in Northumberland represents a major change in how local government is organised (the last major change being in 1974). The decision by the Government to go ahead with the creation of one unitary authority went against the preference of the district councils to create two authorities, one rural and one urban, recognising the different challenges and interests of north Northumberland (including Berwick Borough) and South East Northumberland which has a strong industrial past and faces many of the challenges more typical of urban areas.

8 Improving the quality of life for older people

In this part, we will discuss three main areas (social care, housing and work) that affect the quality of life for older people.

8.1 Adult social care

8.1.1 *Putting People First: transformation programme in adult social care*

In 2005 the Department of Health (DoH) launched a major consultation exercise on social care with the document "Your health, your care, your say"²⁹. Since then a series of guidance documents have set out a new system of providing social care that tries to provide care for all while recognising the right of individuals to retain independence, control and dignity. The framework for cross sector reform is set out in the Ministerial concordat "Putting People First"³⁰, launched on 10 December 2007. One of the major shifts has been the introduction of personal care budgets³¹. Each local authority is now expected to transform the way they deliver adult social services in line with a recognition that service users expect greater choice and control to create self directed support. In Northumberland, 'Putting People First in Northumberland - Transformation Programme'³² has been led by Northumberland Care Trust. Since the transformation team³³ of eight officers³⁴ was put in place in January 2009, an organisational framework has been set up to widen the range of actors. There are 6 project groups: Self-Directed Support; Business and Systems; Commissioning and Procurement; Customer Experience; Workforce Development; Market and Community Development each led by various talents across the organisation regardless of their 'social care' background, which is crucial point in delivering the transformation agenda in an holistic way.

²⁹

http://www.dh.gov.uk/en/Publicationsandstatistics/Publications/PublicationsPolicyAndGuidance/DH_4127357
(accessed on 22 October 2009)

³⁰ Putting People First: a shared vision and commitment to the transformation of Adult Social Care,
http://www.dh.gov.uk/en/Publicationsandstatistics/Publications/PublicationsPolicyAndGuidance/DH_081118
[accessed on 12 May 2009]

³¹ According to DoH, a personal care budget helps people to get the services they need to achieve their care outcomes, by letting them take as much control over how money is spent on their care as is appropriate for them. It does not necessarily mean giving them the money itself. As described in section 3.6, personal health budgets could work in many ways, including: 1) a notional budget held by the commissioner; 2) a budget managed on the individual's behalf by a third party; and 3) a cash payment to the individual (a 'healthcare direct payment').

³² <http://www.northumberlandcaretrust.nhs.uk/services/adult-social-care-services/putting-people-first>

³³ The transformation team has moved under a new Chair, who is the head of Council.

³⁴ The Associate Director, the Programme Manager, the Project Manager and the Information Officer.

Given the national trend towards target setting for public services, there are targets that need to be achieved by April 2011, including the *number* of personal budgets and the *amount of funds* being spent on personal budgets. Accordingly, strategic guidance in Northumberland is about to be issued, which will provide a framework for the coming year. Northumberland is facing particular difficulties in that it is experiencing an increase in the older population which demands that the social care budget be stretched even further.

There was a big Community Launch in March 2009 with staff, family and informal carers, voluntary and community sector workers. This attempted to put across a key message that 'everything is still open, and your input is important'. At the same time, 70 smaller events were organised for staff, users, and providers. Social care staff needed more training and skills development to meet the demands of the new regime. The assessment for the personal budget will be written as either a self-assessment or a professional-led assessment. This will be a challenge for some users and care managers. Given the choice, someone might not want to use the Day Centre at all, but use the money for a taxi to visit their sister-in-law and have tea together. Professionals need to prompt people that this is an option. However, transport is a big issue in rural areas, and if transport services are not eligible within the personal budget, then the individual will be disadvantaged. There are other ways to create a new type of care support by grouping people. If a group of 10 pool their personal budgets, they could employ someone to look after them rotationally, as needed – this type of group arrangement would work for people with fluctuating conditions such as multiple sclerosis.

Providers also need to know that the personal budget system shifts from block contracting to more individual commissioning. Providers are supplied with an individual service fund to support individual service agreements, in place of the former block contracts. There is a quality assurance check made of providers, including any existing contracts with a provider, their ethos and the challenges that some organisations are facing. A new initiative has been to use the internet³⁵ to market the different options available. Large and small organisations can advertise on this e-market place, and service users and care managers can choose services by area or by cost. Those who want to advertise on the site are subject to a quality assurance check. Increasingly older people are more comfortable with using web based tools and for the future this is certain to increase. For the moment it is more likely that care managers, or whoever is brokering support, will use the site. Using this model, each local



³⁵ "Shop 4 Support" is one example. <http://www.shop4support.com/s4s/ui/content/> (accessed on 14 May 2009)

area can create a local version of this e-shop by engaging providers, who need to be well-informed and supported in order to best match to the local needs. There are already a large number of services available in Northumberland, what has been lacking is a co-ordinating mechanism.

In rural areas to what extent will the personal budget system help the older community? At this moment, "large scale organisations are still not interested in delivering to the rural parts of the county, so they've cherry-picked the easiest place to deliver – Northumberland's South East corner" (a member of the Transformation Team). This is because while it costs more to deliver the same unit of care to rural areas than in urban areas, there is no extra money available. Service delivery to rural locations is already stretched. Nevertheless, rural areas could make the best of their community strengths. By using personal budgets, potentially there are work opportunities for those who may not want full time employment or formal work but nevertheless have time to give and would like to earn a little. For many older people taking up the personal budget brings concern over 'whether the employee/contractor is trustworthy' and 'whether older people themselves can keep managing their budgets'. Designing a scheme which is user-friendly and approachable is the key here, alleviating the concerns and anxieties of each older person. This may demand that the local network becomes the vehicle for service delivery. It does not mean building a new infrastructure from scratch, but identifying key providers in areas, working with them and extending their sphere of influence and capacity. Therefore, each local area might well have a unique network model.

In small villages, where younger people have moved away, the personal budget can support people to work collaboratively, to provide care for each other; this could empower them and bring them back into economic activity. To make this happen, the key is to build good linkages between the statutory, voluntary and community sectors. Designing a better social care system is dependent on "getting involved with mainstream development in the communities both in terms of social capital and re-growth. When the money's tight, it's counter-intuitive to spend on developing infrastructure to make things viable" (a Transformation Programme Team staff member). The Transformation Programme Team in Northumberland has approached existing 'user-led' organisations including Carers Northumberland (support network of carers), Bell View (community-based care service) and Adapt³⁶ (community transport service). More details of these initiatives are explained in the next section.

³⁶ <http://www.adapt-tyne-dale.org.uk/> (accessed on 14 May 2009). "Adapt" is a supportive social group. They have been working with older women who can not drive, were depending on a partner who could but has lost the ability or died, and are now stranded without transport. Quite often they had passed their test but lost confidence because it was always the husband who drove the car. Adapt have a scheme for confidence building and retraining to get these women driving again.

In responding to an increasingly diverse range of needs with limited public money, is involving care providers from the third sector or voluntary based organisations a possible way forward? Some professionals in the social care sector acknowledge that since the Community Care Act (1998), "we've driven ourselves into looking at more and more fixed criteria, focusing social care on people with acute needs". The impact of the regulator on social care is another issue. No one would argue against the need for regulation in the desire to raise standards – but regulation can also restrict the size of the market to such an extent that lack of competition causes standards to slide. Social care now assumes everyone is a self-funder, however information has to be provided for all of us. It is a question of how those excluded from social care as well as those experiencing a challenging old age can benefit equally.

8.1.2 *Carers Northumberland*

Carers Northumberland is a registered charity and a registered company, which aims to link experienced or former carers with inexperienced and/or struggling carers via telephone and/or email contact for the purposes of support, information sharing and friendship. It was originally established as the North Northumberland Carer Link Project in April 2005 (only operating in Ashington, Blyth and Morpeth), and now operates Northumberland county-wide since April 2008. With three years' grant from the Big Lottery Fund, Northumberland Care Trust, Northern Rock Foundation and through its own fundraising, four full-time staff are currently working in Pegswood (the South), Hexham (the West) and Belford (the North) offices. Its Trustee Board consists of carers and former carers mostly aged over 50 who are active and constantly involved in what's going on. The organisation seeks to encourage the participation of older people within the county.

There is a concentration of population in the South East corner of the county and there are more carers there. Carers Northumberland particularly provides services out to the rural carers. Overall, there are 34,000 carers in the county according to the last census. 7,000 are providing more than 50 hours care per week. To date, 450 carers have been registered with the organisation and the number of registered carers is slowly increasing by word of mouth, promotion through social services teams, the press, posters, newsletters etc. Predominantly the clients are over 60. There are significant numbers of older people looking after their spouses or other family members such as children, or young adults with disabilities and they need to be supported. They are doing a valuable job in caring for family members and friends, particularly in rural areas where care workers are limited.

The main activities of the organisation include: 1) to provide support groups where carers come together; 2) one-to-one support for carers; 3) distribution of a newsletter; and 4) developing information services in association with Carers UK³⁷, and the Princess Royal Trust for Carers³⁸. Along

³⁷ <http://www.carersuk.org/Home> (accessed on 14 Mar 2009)

with these generic services, Carers Northumberland liaises with other organisations such as the Alzheimer's Society³⁹ for specialist support. They can also arrange benefits advice, not only about entitlements but also how to access the system. Although there are no specialist facilities for carers, the organisation provides a venue at local community centres such as the Bell View Resource Centre. They run a series of pampering events around the county. They can pay for transport and sometimes provide the costs of caring while the main carer is out. Various skills development programmes are also provided – these include caring skills, food handling or sometimes make-up lessons for men. These are important when the wife cannot do this for herself but still wants to present herself well but her husband or son does not know to apply it. Yet it would make a huge difference to the woman in terms of well-being if he could learn. Skills development needs to be more creative to support particularly male carers who might otherwise feel isolated and overwhelmed. Other support includes assisting people back into employment and building confidence.

The biggest issue identified amongst carers is about getting a break from caring. Carers tend to feel that “no-one can do it the way I can!”, however if they are caring 24 hours a day, 7 days per week, this effort cannot be sustained. They will get to the point where they need to get away. How can carers achieve a balance between their own needs and their care responsibilities before they reach the point of collapse? The Northumberland Care Trust has established a Carers' Opportunities Fund, which gives grants to carers to give them a break from caring. These grants are flexible – carers could buy a printer, carry on with their Open University courses, buy some alternative therapy, or have a night out at the theatre! This scheme increasingly relates to the Personalised Budgets transformation agenda. More attention has been given to the well-being of carers: “Carers at the heart of 21st century families and communities: a caring system on your side, a life of your own”⁴⁰. The National Carer Strategy was launched in 2008, with the policy of “Carer's Demonstration Sites”. Carers Northumberland is now planning to set up carer health checks – some carers have severe back pain from lifting and injuries but these often get overlooked as the focus is on the person they are caring for. A preventative programme would create long-term benefits in social and economic terms. Carers, often older people themselves, tend to ignore their own health to the point of collapse and calling an ambulance. It is therefore very important to consider the well-being of carers as well as the person they are caring for.

There are Local Support Groups for carers, who are linked to experienced carers through a telephone link system operated by a pool of telephone volunteers. Carers speak to each other

³⁸ <http://www.carers.org/> (accessed on 14 May 2009)

³⁹ <http://alzheimers.org.uk/site/index.php> (accessed on 14 May 2009)

⁴⁰

http://www.dh.gov.uk/en/Publicationsandstatistics/Publications/PublicationsPolicyAndGuidance/DH_085345
(accessed on 14 May 2009)

when they want. A project manager of the organisation claimed that "there is room for something about putting people in touch in a local area. For some, it would be an internet chat room facility. There was the example of two men who met at a face-to-face support group and formed a friendship. They took part in lots of activities that they would not otherwise have done". One of their Trustees suggested using a social networking site such as Facebook. About 1,000 of the 34,000 Northumberland Carers are in the younger age bracket which is the largest user group for Facebook and they can get information and support that they need through this link. This seems a particularly powerful tool for young mothers at home with children.

Given that the current grant ends in three years, the organisation will have to look for alternative funding to carry on. The longer people live, the higher the number of those who may be needing care becomes. Nevertheless, a fundamental difficulty lies in rural areas – the lack of care workers. It is partly due to population and also a poor perception of the care workers job which is associated with poor salary and working conditions. Under the personal budget regime, people may be assessed as requiring home care support, but if there is no one in the area to provide it, they will not get any. "The transformation agenda, holding your own budget – in principle it looks fantastic, but the reality is, if there is nothing for you to spend the money on, how are they going to match that to theory?" (a project manager, Carers Northumberland).

8.1.3 A community-based social care project - the Bell View Resource Centre

The Bell View Resource Centre & Day Care facility is an innovative community-based service located in Belford. It is a charity that was set up to support older people to live independently within a rural area. Its story began in 1998, when the decision was taken to close the Bell View Residential Home for Older People, owned by Northumberland County Council. The Home itself had taken over the buildings of the Poor Law Union Workhouse, which existed from 1838 to 1930 (Bowen, 2005). The decision to close the home was not itself of critical importance to local people, it was the loss of day care provision that had also been provided there. Facing the decision to close the Home, local communities campaigned firstly to reject closure and then to have a new and improved facility put in its place. Bell View (Belford) Ltd was eventually formed in 1998 as a local community charity, redeveloping the site of Bell View Residential Home, to provide an integrated resource centre and sheltered housing project. Northumberland County Council agreed to provide the site on a 999 year peppercorn lease so



Photos: (top) Bell View Resource Centre and Day Care, (bottom) Regular visitors at the Day Care

that it would be used to maintain day-care and other services for older people. A total of £1.5million was raised for the new buildings, consisting of Day-Care and a Resource Centre, together with five sheltered housing bungalows managed by Johnnie Johnson Housing Trust⁴¹. Various care services are provided from the centre to a broad rural area – including Wooler, and right up to the edge of Berwick.

Daily activities include day care provision for older people (maximum 60 people per week) and various activities for all local communities (e.g. art group, bridge club, yoga, therapeutic treatments). The charity's aims and objectives are to support older people, however the Resource Centre is open to anyone. The café is an inviting space for all generations, serving tea & coffee and home made cakes. Free public internet and PC access also attracts both young and old residents to the Centre from the local area. The Centre also provides transport services (through their own minibus) for registered members through a subscription fee of £5 per year. People can go shopping or to the hairdressers wherever they want supported by a core group of volunteer drivers. There are four paid staff (two full time and two part time) working in the Centre and many local volunteers helping to provide the range of services (12 for catering and café services, 15 for community transport, six for reception services, and more for local history projects and fundraising etc). The vast majority of these active volunteers are over 50, which is the positive side of living in an area where there is a lot of inward migration of older people. "This place wouldn't run without the inward migration of older people" (Service Development Manager, the Bell View). The running cost for the services is covered by a wide range of income streams: mainly rent for rooms in the Resource Centre, various fundraising activities, and donations from a range of sources. Addressing social and rural isolation, the Centre encourages community participation so as to become a hub for rural communities, for whom access to, and choice of, services and information would be otherwise very poor.

The Centre has recently developed a new pilot project called 'the Home from Hospital', which is for older people who are being discharged from hospital. "It is neither a befriending service, nor providing medical care: rather, it provides social contact, milk, sandwiches, feeding the cat, walking the dog – it is like neighbourly support" (Service Development Manager, the Bell View). Hospitals aim at rapid discharge, and older people are desperate to get out of hospital but may underestimate how difficult it might be to cope at home once they are out of hospital – they forget how much you have to take on when you are running your home. Before the scheme was set up, a local GP suggested that former patients should be consulted to see if they would have used such a service if available. The staff from the Bell View visited the older people discharged from hospital and all who were asked said they would have used the service. In rural areas, it is easily assumed that neighbours look after each other, however, what was found in consultation was that people much prefer to use a scheme like this rather than ask their neighbours, as simply they do not want

⁴¹ <http://www.jjhousing.co.uk/> (accessed on 15 May 2009)

to be seen as burdening neighbours. In this scheme, the older people know that the helpers are volunteers who want to do this work and they need not feel they are “putting on” people. What is also needed is a key contact for each person discharged from hospital “For the older, frailer, vulnerable clients, they wanted social contact because they were so tempted to overstretch themselves if there's nobody there. There was one old man who just had a knee replacement and his wife went out to work: he said he was tempted to do the most stupid things.”

As a pilot project there are teething problems, such as the remit of volunteers. One of volunteers is a retired nurse but others are less clear about the boundaries. In order to protect volunteers, it is important to let the client know what the service is about. A lot of training with volunteers is provided particularly on local information – STARS⁴² (handy-man schemes), helplines, mobile libraries, and facilities at Bell View. After a one year pilot, they have decided to limit the scheme to the patients of the Belford practice (local GP). The Belford practice has invested money in volunteer expenses and training. They recruit volunteers specifically for this scheme. At the time of the interview, they have five volunteers and three referrals, through advertising and promoting the new scheme.

Another new project the Bell View recently launched is a Luncheon Club. It is for people who, though rurally isolated, do not have care needs. Once a fortnight, a lunch is served at the Centre for 8 people (they are all over 80, and two are over 90) and transport is provided. The idea of the Luncheon Club is very popular and many communities have set up these activities. However, the project at the Bell View was not as easy as it was initially thought. “For example, there is a woman in her 80s who left her house only once per month. Her GP suggested a lunch club – it was 2 weeks until she agreed even to be rung up by us. Then it was a real struggle to get her to come to the lunch club. We had to do a home visit, and she said ‘I thought you'd make me come to a room with 30 people sitting around the wall, watching TV!’ We explained it was just 8 people and she agreed to come on the condition that I would drive her home if she didn't like it” (Service Development Manager). It is often the case with older people living in very isolated conditions that physical isolation can lead to social isolation. As the first group of 8 members with 2-3 staff starts to gel, people become more familiar with making social contacts, for example one lady who comes to the lunch club is now thinking of joining the other groups at the Centre. Although most of people just want to chat, rather than becoming involved in more activities there are walking groups and more activity based groups. There are some people already using community transport for the club that the Bell View provides. They charge £2.50 for groups and a 50p contribution for transport. In the future a second Luncheon Club is planned to draw in a further group of elders who are living in isolated situations.

⁴² <http://www.northumberlandstars.org.uk/> (accessed on 15 May 2009)

In association with the personal budget and transformation agenda, the Bell View runs a register of care workers. They look for people who are willing to work in a rural area and support people who want to take a bit of responsibility for their own care – but help them with the security element. In a recruitment process, people are required to fill in a form (including two character references and submit to a CRB check⁴³), then to meet with Service Development Manager at the Bell View who explains the scheme. The care workers who are recruited are asked to come to three training sessions including food safety and manual handling, and to come back for a debrief after training. Even people without a car, if they are in a town, like Wooler, can be care workers for those within walking distance. The register takes their name, phone number, the area they can work in, the hours and days they want to work. Here, however, Bell View acts here as a facilitator since it is not ultimately the employer of the care workers.

As mentioned earlier, the scheme has been a joint effort between SureStart⁴⁴, the Northumberland Care Trust and Bell View, working in partnership. SureStart was interested in getting employment for young parents within their community with hours to suit. The Bell View was originally targeting parents with their own caring responsibilities, if they were looking for local, flexible work. The bulk of people on the register who are looking for local work are also from that demographic group – younger people with children. It can be a problem getting evening care, however the register at the Bell View is only one option for people and creating a variety of opportunities is important. There are others on the register, including experienced care workers who are tired of travelling all over North Northumberland for the minimum wage. “These carers could work through the individual budgets system as well”. The organisation is now setting up training for National Vocational Qualifications⁴⁵ in Social Care for registered care workers.

The Bell View has a lot of strength in social care delivery. With none of the subsidy but also with none of the bureaucratic responsibilities attached to local authorities, their activities have not suffered a great deal through local government reorganisation. Although it is acknowledged that the chaos will have a knock-on effect for their clients. There seem a lot of opportunities for more joined-up working. The Bell View has always had very clear aims and objectives; it has never wavered and has not been tempted down the track of pursuing funding for its own sake. “We’re very solid, we don’t sway with what goes on. What’s coming up sits nicely with that, but we wouldn’t go down that route if it didn’t sit well with the core strategy of Bell View.” (Service Development Manager, the Bell View). This is what funders like to support.

⁴³ The Criminal Records Bureau, an Executive Agency of the Home Office, provides wider access to criminal record information through its Disclosure service.

⁴⁴ Sure Start is the Government programme to deliver the best start in life for every child. We bring together early education, childcare, health and family support. <http://www.surestart.gov.uk/> (accessed on 15 May 2009)

⁴⁵ http://www.qca.org.uk/qca_6640.aspx (accessed on 15 May 2009)

8.2 Housing

Housing matters for older people. It is not only about specialised accommodation for older people in need, but also about the quality of mainstream housing, where most older people live out their lives. "Helping older people to arrive at successful housing solutions requires a consideration of how housing fits in with other aspects of people's lives, and with their overall sense of well-being (Bevan, 2009: 233)". In this section, we will discuss the current housing condition in rural Northumberland and the housing policy that is shaping the future direction of the housing market and the quality of the housing offer, before moving on to consider some new schemes that have emerged to respond to social change in the area.

8.2.1 Housing Policy in Northumberland

In July 2007, Northumberland Housing Board published a county wide housing strategy "A Sub-Regional Housing Strategy for Northumberland 2007-2011" (Northumberland Housing Board, 2007). It is the first housing strategy at the sub-regional level. This document fits with the priorities and objectives contained in the North East Regional Housing Strategy, "Quality Places for a Dynamic Region: North East Regional Housing Strategy"⁴⁶ (Aug 2007). The Northumberland Housing Strategy was prepared in partnership with Northumberland Supporting People⁴⁷ (a scheme that helps people live independently in their own homes), Northumberland Strategic Partnership⁴⁸ (a local strategic partnership which is responsible for the Community Plan⁴⁹), and the Home Builders Federation. The housing strategy aims to ensure that housing policy has a strong link to wider socio-economic policies, health and social services as well as across the range of tenures and providers.

According to the housing strategy (Northumberland Housing Board, 2007: 7), there are 131,400 households in Northumberland, 23% of which are located in rural areas (coastal and rural upland). The tenure characteristics show that 67% of housing stock is owner occupied (although this is slightly lower in rural areas), and it has increased due to the reduction in social housing stock. In

⁴⁶ <http://www.northeastassembly.gov.uk/document.asp?id=365> (accessed on 18 May 2009)

⁴⁷ <http://www.northumberland.gov.uk/Default.aspx?page=1019> (accessed on 20 May 2009)

⁴⁸ Northumberland Strategic Partnership (NSP) was comprised of a wide range of organisations representing the range of sectors and interests across Northumberland. It had a variety of functions, including to promote partnership working, exercise a leadership role in promoting the interests of rural communities and co-ordinating community consultation and engagement activities. As of April 1st 2009, NSP became the single Local Strategic Partnership for Northumberland within the Policy and Partnership service of the new unitary authority.

⁴⁹ Releasing the strength of our communities: A sustainable community strategy for Northumberland to 2021, <http://www.nsp.org.uk/downloaddoc.asp?id=1207> (accessed on 20 May 2009).

terms of the growth of housing supply between 1995 and 2006, the Rural Upland areas saw the largest relative increase in housing stock (37.9% with an absolute increase of 600 dwellings), compared to other areas (7.7%-8.3%). In Northumberland, the proportion of detached properties (26.2%) is significantly higher than other neighbouring regions, though many of them are in the urban commuter and rural market towns. Given that detached properties often have at least four bedrooms there is concern about the growing mismatch between the existing stock and increasing demands of smaller households which in the rural areas often comprise of older couples or older people living alone.

The housing strategy sets out its vision for the region as "having a high quality of life: featuring a dynamic economy, a healthy environment, and a distinctive culture; and realising everyone's full potential" (ibid: 11). Housing quality is therefore a key issue. However, there are two main challenges to be tackled here: the poor quality of housing and its affordability. The poor housing condition is often seen in the former industrial dwellings but it also exists in pockets within relatively wealthy market towns and some rural settlements. Who should intervene to rejuvenate the poor housing stock to meet people's aspirations in the 21st century? A significant housing price increase over the last decade is a nation wide phenomenon. House prices across Northumberland have increased rapidly, "with an overall growth of around 200% over the period 1995-2006, the exception being Alnwick (a popular market town), where prices increased by 286% to £207,300 (mean house price)" (ibid: 28). The affordability issue is more acute in rural areas where the high quality peaceful environment attracts an increasing influx of wealthy families or retirees. The relatively high prices of detached dwellings and relative scarcity of smaller affordable units pushes up average prices which is particularly acute in those rural areas where average income levels are low. The increasing popularity of second homes, particularly in coastal areas in Berwick - 10.7% of their total housing stock in 2006 (ibid: 31) - and market towns such as Alnwick (6.8%), also worsens the affordability issue⁵⁰.

However, the global recession in 2009 has shown us that the policy maker and regulator have little power to stop this market demand. A pessimistic view is taken in the housing strategy: "increasing the supply of new housing will not significantly reduce house prices" (ibid: 31). If the market itself

⁵⁰ The affordability issue is worsened considerably by the limited housing supply in rural areas which is restricted by the UK's conservative planning system. Recently the Prime Minister Gordon Brown asked Matthew Taylor, an MP in the South West of England to undertake a review of affordable housing and the rural economy (Taylor, 2008). In it, Matthew Taylor criticises the planning system in the UK for adopting a narrow definition of sustainability in which housing (and other) development is only allowed in settlements which have a basic level of services. Settlements without these services are thus left in a 'sustainability trap' in which they are not permitted housing development and therefore have no prospect of becoming more sustainable. The Government has welcomed Taylor's report and responded positively to almost all of its recommendations opening up the possibility of a more flexible, proactive planning system in the UK in future.

cannot provide solutions, do we need much tougher regulations and control over the housing market?

The housing strategy also addresses the issues of an ageing population. A housing needs assessment provides a picture of the housing conditions in which people with particular needs live in Northumberland (ibid: 57-58). Overall in Northumberland, 28,769 households (22% of all households) contain one or more members with special needs. Mobility problems account for the largest percentage of households with special needs requirements with 15,823 households (12.1% of all households), followed by older people at 5,884 households (4.5%). 55.6% of households with special needs live in the owner occupied sector, followed by 20.2% in local authority rented sector, 13.5% live in the Registered Social Landlord properties (not for profit sector) and 8.8% of special needs households live in the private rented sector. Typical housing adaptations for householders with special needs, including handrails, bathroom adaptation, ground floor toilet, stair lift, wheelchair adaptations and so forth, have been met with 8.5% of households having aids and adaptations in their homes but demand far outstrips supply. The main source of finance is the Disabled Facilities Grant available through local authorities but clearly "the perceived need of households is far greater than the availability of grant assistance" (ibid: 59).

In the following sections, we will discuss current approaches to responding to demographic ageing.

8.2.2 *Supporting People*

The Supporting People programme was introduced in 2003 to provide a better quality of life for vulnerable people to live more independently in their own home. The programme provides housing related support to prevent problems that can often lead to hospitalisation, institutional care or homelessness and can help the smooth transition to independent living for those leaving an institutionalised environment. The programme was designed to be delivered locally by administering authorities, however, the six districts in Northumberland decided to pool their funds in one pot, which is managed by the Supporting People team in the Northumberland County Council in Morpeth. The team delivers a £7 million programme a year (2008-2010), funded by the Department for Communities and Local Government. Covering the whole county, the programme employs 68 providers and 180 services, which equates to 10,000 people funded through Supporting People. Half of the clients are older people, who are funded to have Community Alarm systems. The total programme budget is split roughly across three types of client groups: one third of the money – around £2,000,000 – goes to Learning Disabled people; one third goes to Older People; and about one third is split between 19 diverse client groups including people with mental health problems and a whole range of others.

When it was first introduced, the Supporting People programme was unable to support people in private housing, but now the service can be offered to all tenures as long as people are receiving a significant benefit (such as Pension Credits⁵¹). The support services include: making the home safe and secure; the safety of equipment; cleaning for people who cannot do it themselves; arranging for the collection of prescriptions; arranging for different professionals to call; if there are disputes, arranging for the different providers to sort them out; and making sure people are getting the right benefits. There is a fairly heavy contractual input into Older People's Services in Northumberland. One of the Supporting People's contractors is the Northumberland Home Improvement Agency⁵², a not for profit organisation. It mainly covers Tynedale, helping homeowners and private sector tenants, who are older, disabled or vulnerable, to repair, improve, maintain or adapt their homes enabling them to remain in their own home, safe, secure, warm and independent. Before the unification of the six local authorities, the HIA had been struggling to deliver services to the other Northumberland areas, due to each district council's view of how the agency should be funded. However, with the local government reorganisation, this situation will change.

The Department for Communities and Local Government are planning to review Supporting People services. It will shift funding from resident warden services to travelling or mobile wardens, and also introduce more telecare and telehealth services. However, sheltered residents currently served by the Supporting People team do not want that to happen, as it results in a loss of their wardens. The warden gives older residents confidence. Replacing existing wardens by new mobile wardens or technologies also "destabilises the market and alienates an awful lot of providers". Any attempt to create change has to be carefully considered and planned. It must be linked to the housing strategy and other adult social care services, which are now operating under one unitary government. More importantly, getting user groups involved seems to be the key to improve the services. The Northumberland Supporting People team has been working on this issue.

Since their first inspection in 2008, which criticised a lack of service user involvement, the team have tried "meaningful consultation" by asking people by letter how they wanted to be involved in Supporting People. There were several choices on offer: being involved in policy, in procedures and different methods of involvement from meetings, through to questionnaires. Now the team has determined a good sized group who want to be involved. The Service User Group meets on a

⁵¹ Pension Credit is extra money and people aged 60+ living in Great Britain whose income (including state pension) is under certain level are entitled. Pension Credit guarantees everyone aged 60+ an income of at least: £130.00 a week if you are single; £198.45 a week if you have a partner. Also, if you or your partner are 65 or over you may be rewarded for saving for your retirement, up to: £20.40 if you are single; £27.03 a week if you have a partner. <http://www.thepensionsservice.gov.uk/pensioncredit/home.asp> (accessed on 21 May 2009)

⁵² <http://www.northumberlandhia.org.uk/> (accessed on 21 May 2009)

regular basis. They want to make sure their sheltered housing premises are safe and well-maintained. There has been a lot of confusion around charging: what is included in the rent, what does the service charge cover, what indeed is Supporting People? Other issues that concern older people arise from social care – discharge from hospital and so on. The consultees who want to meet in groups are invited if they are holding a group meeting; those who prefer to write their responses get sent a questionnaire. This multi faceted approach has resulted in the formation of a service user interest group, 80% of which is from the older age group. Those user groups have told the team what they want, for example, from the newsletter. Based on this, the newsletter was renamed and edited. With the new title “Living a real life”, which was chosen by the user groups and replaced ‘Supporting People News’, the newsletter contains recipes, jokes, stories, a more readable typeface as well as the details of the Supporting People spend, costs etc. “The consultation side is really important to us”. There is now a really solid group of people the team can talk to, mostly older people. For instance, when the team was working on a vulnerable person statement⁵³ with the council, ten of their service users were involved. There was a judicial review of this term ‘vulnerable person’ used in eligibility criteria. It was challenged by a service user. The judgement was that the Local Authority in question had correctly administered its own eligibility criterion, but the criterion itself – the definition of a vulnerable person – was too narrow and very few people can fit. Engaging user groups in the policy making process is so important in delivering effective services, rather than simply relying on criteria defined from above.

Implementation can be also improved by engaging user groups, user-led organisations and local volunteers. The Supporting People team is considering various opportunities. One service is a “key ring” type service. This originated with schedule 1 sex offenders, but it can be used in any group of dwellings or location. In the original scheme, one person gets their house rent-free, and is given a responsibility to check up on their neighbours and report back to the provider. The Registered Social Landlord provides the property free and the tenant is then expected to do ‘good neighbour’ type tasks. Some of these service users have been trained to be “peer assessors”, who talk to other service users about the quality of their services and thus – “get more authentic information about the services than we could ever get approaching users in a suit and a tie, obviously representing the provider”. The ‘peer assessors’ also feed back to the programme. The Supporting People programme is also trying to involve volunteers in commissioning and tendering services. 8 volunteers have been trained to work through the process of tendering and evaluation of services. Many are retired people, coming back from retirement to do something they see as useful.

An interesting story was heard about how engaging older people in the political arena could improve the overall living environment for local communities. The Service User Forum in Hexham was asked to comment on a perceived problem with a rough sleepers hostel. The hostel, run by a

⁵³ Some eligibility criteria for council services state that they are available only to a “vulnerable person”.

charity called 'Stop Gap'⁵⁴, was open only from 5pm to 8am and outside those times, people were supposed to find somewhere else to go. From 8am to 5pm they were wandering the streets. The older people in the Forum could not understand it, and felt that 'something has to be done'. They eventually took the issue to the commissioning body. Young people were wandering around all day in Hexham with nowhere to go. Responding to this, the Supporting People team asked the provider to bid for funds which was successful in providing a new place for rough sleepers to go in the day. The Service User Forum may have influenced this and older people also recognised it as a significant and efficient way to engage all age groups in creative thinking about services in the area.

8.2.3 Berwick Borough Housing

In Northumberland, social rented housing accounted for 21.5% of the total housing stock in 2001⁵⁵. The condition of the social housing stock is being tackled through investment to bring the dwellings up to Decent Homes Standard⁵⁶, which has been made possible by the transfer of the council housing stock to other social landlords. In the Communities Plan, 'Sustainable communities: building for the future' the Government sets out three options to housing transfer: (1) setting up an Arm's Length Management Organisation (ALMO), a company created by the council to manage its homes; (2) using Private Finance Initiative (PFI) to encourage extra private sector investment; and (3) transferring all or some of the stock to a Registered Social Landlord (RSL), which can use the stock as collateral to raise investment funds. Across Northumberland, there have been five major stock transfers made over the last decade (see Table 4). In the following section, we will examine the case of Berwick Borough Housing and the impacts on the quality of living space for older residents and their neighbourhood environments.

| Area | Stock option | New management organisation | Transfer date | Decent Home Standard achievement target date |
|--------------------|--------------|-----------------------------|---------------|--|
| Berwick upon Tweed | RSL | Berwick Borough Housing | 01/04/2008 | 2010 |
| Blyth Valley | ALMO | Blyth Valley Housing | 01/04/2003 | 2007/2008 |
| Castle Morpeth | RSL | Castle Morpeth Housing | 03/10/2007 | 2010 |
| Tynedale | RSL | Milecastle Housing | 01/12/1999 | 2010 |
| Wansbeck | RSL | Wansbeck Homes | 01/01/2008 | 2012 |

Source: the Sub-regional Housing Strategy (Northumberland Housing Board, 2007:46)

Table 4: Housing Stock Transfer in Northumberland

⁵⁴ Hexham-based StopGap is a charity set up in 1997 which aims to find temporary accommodation for homeless people in parts of Northumberland.

⁵⁵ Sub-regional Housing Strategy, p8

⁵⁶ <http://www.communities.gov.uk/housing/decenthomes/whatis/> (accessed 22 May 2009)

After a major consultation exercise undertaken by the former Berwick Borough Council, the transfer of Berwick Council's 1,900 homes to the newly formed company (RSL), Berwick Borough Housing (BBH)⁵⁷, was completed in November 2008. This is a not-for-profit organisation, therefore any surpluses are re-invested back into the organisation to maintain and improve homes and services. Three groups operate within BBH: assets (maintaining existing buildings), business (management of finances), and customer (services to tenants). The customer team has a strong link to the assets team. BBH's objectives are to provide more independent housing and services that support people to do so. The main issues for older people in the area are adaptation (including those provided by Disabled Facilities Grant) and the shortage of sheltered housing. To improve the housing standard, BBH is promoting the demolition of existing housing stock and building new stock, supported by the Housing Corporation. In older homes, there are planned improvements to community rooms that could become spaces for various social activities. In new properties, alarms are to be installed in all units of accommodation, and it is planned to increase the supply of bungalows.

Although there is not much real crime or vandalism, older people tend to feel unsafe if there are young people hanging around the street corners. Therefore reducing the fear of crime is another priority. To improve support services, it is important to raise awareness of the benefits that older residents might be eligible for. BBH has been involved in the Housing Strategy for Northumberland, which has been developed in association with the Supporting People scheme. It was acknowledged by one of officers of BBH that the "SP can do more. We need more funding to achieve improvement". For instance, there is no 'meals on wheels' services available at the moment; however these services may be added if residents require them. To improve the services, BBH engages the residents in sheltered housing to participate both in decision making processes and in various activities. There are three sheltered housing schemes that have community hall space, where other organisations can run activities such as providing new learning opportunities. Working in partnership with other bodies is crucial to improve their services too, and BBH is planning to work with the police, fire service, Citizen's Advice Bureau, the Unitary Authority, and the NHS.

8.2.4 *Johnnie Johnson Housing*

The "Johnnie" Johnson Housing (JJH) Trust⁵⁸, established in 1969, is a not-for-profit organisation and a Registered Social Landlord⁵⁹ providing accommodation and care services. Working with Local Authorities throughout the North of England, JJH currently provides over 4,300 homes including general needs housing, retirement housing, housing for the less able, rural housing, special needs

⁵⁷ <http://www.berwickboroughhousing.co.uk/> (accessed on 22 May 2009)

⁵⁸ <http://www.jjhousing.co.uk/> (accessed on 5 June 2009)

⁵⁹ Under the recent regime change, the JJH is called a Registered Provider – under the aegis of the TSA – the Tenant Services Authority.

housing and shared ownership. The JJH provides social housing funded by the Homes and Communities Agency (formerly the Housing Corporation) and builds some housing for sale. However, in the North East there are few houses for sale because even shared ownership properties are out of the financial reach of ordinary people. Belford, for example, has a very low wage economy, while land owners have certain expectations in terms of land value. In the longer term, house prices may decrease, but expectations of what people feel their land is worth will not change so quickly.

Some of JJH's developments are ex-Local Authority stock. One example is an estate for the council in Morpeth which was transferred to JJH for £2,000. There were three people who owned their homes through the right-to-buy, and JJH had to buy them back in order to complete the redevelopment. Eventually, JJH created 40 new properties for rent, and a private developer built 12 houses for sale, three of which were given to those former right-to-buy owners so they were re-housed into brand new houses. Another example was a transformation of a sheltered accommodation into general housing in Shilbottle. The sheltered scheme run by the Anchor Trust⁶⁰, a not-for-profit provider of housing, support and care in England, was an early 1970s scheme with bedsit-style rooms. The Trust could not afford to improve this because there was no demand for this type of accommodation. So the Trust sold the property to JJH for £1. JJH's decision was not to rebuild accommodation for older people but to exploit the location of Shilbottle as a potential commuter zone being close to the growth point of Alnwick and to the A1 into Newcastle. Thus they built general needs housing for families and commuters.

JJH have properties in various rural areas, but not only build older people's accommodation. Much depends on the Housing Corporation (HCA) programme and the availability of grants which may make building for older people more or less financially viable. Most of JJH's stock is bungalows for families or older people, in places where the land values are more reasonable, for example, Belford. Building good quality two-bedroom bungalows – that can suit small families or older people gives the JJH more flexibility. It is important to consider housing types in rural areas “because these are small communities, the demographic can change more quickly than large cities” (Development Manager the JJH). A good design that enables older people to live independently is another crucial point. As soon as people move into independent accommodation, their care and support needs halve. “Once people have accessible kitchens and they become more confident to do all kinds of things. We've seen it in the tenants in all our schemes” (the manager, JJH). In rural areas, where a house is not suitable, it's a real hazard.

There is a general shortage of all forms of housing in rural areas. It is not specific to older people's housing. There are several reasons to prevent new development in rural areas. The biggest thing that has held back rural housing is ‘Nimbyism’ (‘not in my back yard’) – people wanting their rural

⁶⁰ <http://www.anchor.org.uk/index.asp> (accessed on 5 June 2009)

villages to stay the same. The regional housing plan also proposes strict limits and planners tend to start from the premise of saying "No". While providers want to create lettings restrictions such as "lettable to local people in perpetuity", lenders won't lend on these terms. To build new houses in rural areas brings significant impacts on the village communities too. In Belford, the new housing development brought in professionals and changed the socio-economic profile of the village. This was the village with the largest proportion of council housing of all the nearby villages. These new professionals supported the Bell View project when it was suggested that it might close. Many of the contributors to this campaign had lived in the village for only a few years, but already felt a part of it.

However, in rural areas, there is more hidden need than in urban areas - a lot of people have not enjoyed security of tenure, particularly those who have rented from private landlords. It is often claimed that the big landowning estates look after the exterior of properties but the interiors have often not been upgraded since the 1940s or 1950s (this may be at least partly due to disincentives in the tax system). The private landlords also tend to rehouse their tenants so they may realise the value of their housing stock. Insecurity of tenure is a big issue and it is more acute for older tenants who live in rural areas.

In some rural villages, second homes account for over 50% of housing stock and house prices are too high for average wages in the local area. Rural shared ownership is one solution to achieve 'affordable housing', but this is often limited to a restricted market of 9 or 10 people in a small village who are in a position to buy.

JJH works closely with other local organisations such as TINN (a community transport initiative group), and Age Concern (ACN) and their Community Support outreach and home help service. The ACN recently opened offices in Ashington, where they offer rural services including podiatry, health spas, that tenants will access. While the ACN needs the JJH regarding sheltered schemes, the JJH can benefit in opening lunch clubs in the schemes for a wider community in the area with the ACN. There is a problem with the health service, however. An example of the problems the JJH encounters in that regard is their Support Plans. In sheltered schemes they create support plans for any tenant. If the tenants are having problems, it is all recorded in their support plans. However, the scheme manager will refuse to share the information with health workers, because of data protection and basic client confidentiality, though clearly health workers might benefit greatly from the information within the plans.

8.3 Business

Projections indicate that the proportion of the North East's population which is of working age will decline by about 2% over the next two decades, while at the same time; the

numbers of older people will increase significantly. This represents a challenge for the region in terms of ensuring there are enough workers to sustain regional economic growth and prosperity. Against this background, it is clear that the region needs to fully use the talents, skills and experiences of its older people – harnessing their intellectual and social capital and maximising their contribution to the region.

(Productive Ageing and Employability: Summary Report and Recommendations of the Years Ahead Task Group, Years Ahead⁶¹, 2009)

'Work' is one way for older people to contribute to society, however they face major barriers in finding and retaining employment and overcoming age discrimination. Since the Employment Equality (Age) Regulations 2006 were enacted, it is unlawful to discriminate against employees, job seekers and trainees on the grounds of age, although employers still can set a compulsory retirement age of 65⁶². These changes are most likely to impact on those in their fifties who are currently a disadvantaged group of job seekers. For all older people, recent changes to pensions and retirement are creating incremental changes to the age at which people may draw their state pension such that by 2046 both men and women will have a retirement age of 68.

There are a wide range of organisations, from public to private, that support people finding jobs and setting up new businesses in the UK. One of major players is the Business Link⁶³, a government funded body that provides a free business advice and support service including grants. These services are available locally through regional Business Link operators, primarily funded by the Regional Development Agencies, supported by a number of other government departments, agencies and local authorities. One of the Business Link's objectives is to promote older workers employment⁶⁴ by raising awareness of the benefits that older employees can bring to businesses. The rationale for this strategy is that the labour force is ageing, with the age distribution showing a distinct shift towards older age groups by 2020 (Madouros, 2006). Another government agency is the Jobcentre Plus⁶⁵, a nationwide network supporting people of working age from welfare into work, and helping employers to fill their vacancies. The Jobcentre Plus provides a special support

⁶¹ Years Ahead, the North East Regional Forum on Ageing, was established in 2005 to bring together bodies concerned with the changing age-structure of the North East's population and with issues which influence the health and well-being of older people. <http://www.yearsahead.org.uk/> (accessed on 10 June 2009)

⁶² Employers need to (1) Give all employees the right to request to work beyond a compulsory set retirement age; (2) write to employees no less than six months before the intended retirement date telling them they can request to work longer; and (3) consider all requests.

⁶³ <http://www.businesslink.gov.uk/bdotg/action/home> (accessed on 16 June 2009)

⁶⁴ <http://www.businesslink.gov.uk/bdotg/action/layer?topicId=1082249786> (accesses on 16 June 2009)

⁶⁵ <http://www.jobcentreplus.gov.uk/JCP/index.html> (accessed on 16 June 2009)

programme for people aged over 50, 'New Deal 50'⁶⁶, who are out of work and have been on benefits for the last 6 months or longer. It gives clients training grants and personal advice to acquire new skills to re-enter the job market. Since the current economic downturn (in 2009) applications for Job Seeker's Allowance are increasing, and in the North East of England, 82,845 people are registered, of which 14.7% are over the age of 50 (Martin, 2009). Most local jobcentres are facing a lack of frontline staff as well as a fall in the reported job vacancies. However most of the media attention has been given to the rapid growth of jobless young people. Latest government statistics shows that, in the period January to March 2009, the unemployment rates for those aged 16 and 17 in the UK stood at 29.3 per cent, whereas for working age people as a whole the unemployment rate was 7.1%⁶⁷.

People aged over 50 are feeling less confident about their economic situation because they find that they have not saved enough; the money they have saved is not performing as well as they hoped; and they are living longer and that means more years of retirement to support from savings. This means that many older people may not be able to retire as early as they might have hoped. Although the current economic recession tends to marginalise the issue of older people's employability and give priority to younger people or prime workers (aged 25-49), it is crucial to retain older workers and to return unemployed older workers to the workforce. To create employment opportunities for older people as well as to benefit the economy as a whole, more emphasis is needed on support and advice tailored to the needs of older workers: including re-skilling, training, flexible employment opportunities, and pursuing self-employment. In the following section, we will discuss how this could happen and the key agent to promote older people's employability.

The Northumberland Business Service Ltd (NBSL) is an Enterprise Agency based in Northumberland, operating across the county and the North East of England. They operated under the Business Link for Northumberland and housed the UK Trading Investment team, which kept business and import and export advice very local. In 2007, when the Business Link North East was formed, the NBSL relinquished the licence for Business Link as their activities did not fit in with brokerage model, which the Business Link is now operating. The main task of the NBSL is to get people who are long-term unemployed, or people who have been out of the job market for a period of time because of care responsibilities or illness back into employment through capacity and confidence building. Therefore most of their work is pre start-up animation work and start-up help. Covering Northumberland, the NBSL runs a number of contracts, including an European Regional Development Fund project, the Enterprise Bridge, which helps all sorts of people in the community to become more enterprising through self-employment. Their Head office is located in Ashington

⁶⁶ http://www.jobcentreplus.gov.uk/JCP/stellent/groups/jcp/documents/sitestudio/dev_015301.pdf (accessed on 16 June 2009)

⁶⁷ <http://www.statistics.gov.uk/cpi/nugget.asp?id=2205> (accessed on 17 June 2009)

and there are six offices based in market towns throughout Northumberland (Berwick, Alnwick, Hexham, Wansbeck, Blyth and Morpeth), each with three full-time business advisors. In addition to these, all of the offices are staffed by very experienced self-employed business advisors, generally people who have run their own businesses and are now semi-retired and want to give something back into their local community by helping people to start up. They provide business advice, a workshop programme and deliver training. Their services are more hands on support, helping people to write a business plan and having regular discussions with clients about next steps. By the end of the process, their clients get a robust business plan, and the NBSL team hand them on to the Business Link, who hold all the funding. Although the Business Link has a start up support programme, their interests tend to be focused on high growth businesses. For clients who are long-term unemployed, the NBSL closely work with the Learning Choices (Northumberland), a private limited company, and provide them with interactive discussion sessions. There are several clients who have taken early retirement but still want to be active, maybe not a full-time basis, but they want to do something as a part-time business. Those people may have been offered early retirement or have grown tired of commuting and are looking to self-employment as a viable option, "because it is flexible and they can do what they want to do and then not be stuck working for someone who's probably 30 years younger and has a lot less experience" (Business Advisor, the NBSL).

Taking account of the locality of Northumberland as rural, the NBSL emphasises the community development aspect in delivering their services. The business advisors take their service out to other centres (local development trusts, community centres for instance) where people can make an appointment. "I think it's really important that we get out, and we can see people where they feel comfortable, because sometimes it's quite scary coming into an office, where there might be three people sitting" (Business Advisor, the NBSL). If business advice targets those who are long-term unemployed or living in rural locations where no public transport is available, it is vitally important that they make their services a lot more accessible to the community. Joint working with local development trusts or local bodies would be one step forward. A young man asked the NBSL for help in setting up a youth centre in Berwick because there was nothing for young people and it would be run as a social enterprise. He was introduced to someone at Social Enterprise Northumberland⁶⁸, an advisory body for social enterprise, who could provide specialist advice. The NBSL believes that they can do more in this sector. Whilst from a business principle point of view, the funding for social enterprise is very different but the business side of it still has to function in the same way whether they are setting up a charitable trust or a not for profit venture. "We're seeing more throughout the county, a bigger interest in communities, especially very rural, like in Kielder, where if they don't take over their local services as some sort of community enterprise they've got the garage up there, they've got the cafe up there, they've got accommodation up there; they can't be run as a profit-making business, but they can be run, so I think that's something as a

⁶⁸ <http://www.socialenterprisenorthumberland.co.uk/> (accessed on 17 June 2009).

company we're about to get more involved with, simply because of the unitary authority changes and a lack of staff" (Business Advisor, the NBSL).

The NBSL found people's attitudes very different, especially in rural areas. "People think if they work from home, they're not running a business, and this is also where a lot of people get into trouble because they think, 'Well, I'm not running a business, I don't need to register with the tax people' and then they fall into... and this is where we are trying to encourage those people to kind of formalise how they make money, and be a bit more professional about it, and run their self-employment in the way, apply some business principles to it" (Business Advisor, the NBSL). Tourism is a growing sector in Northumberland, tailoring the marketing is the key. The silver pound is the sector that has been coming here for years, and "senior market doesn't travel as a couple, so it's the ability to have a twin room, you don't always want a double room". It is about training the tourism businesses locally to think about not what suits their houses and what their personal choice would be, but to be as flexible as possible and target their market.

Silver power can flourish in new types of businesses. "People who retire early have far too much energy left...I wish people that were semi-retired and had all these skills would work with young people, being positive role models, especially in rural areas. Lots of people either have dads who have to work away, so they're not there every night, or, a lot of single mums, and I just think kids could do with role models at youth clubs, and they could learn something, they could share their skills". These ideas could be realised as a community business where they could come and share their skills between that generations, and that is where all of their experience and their skills and their transferrable skills could be utilised, and the young people could build relationships with people of a different generation. The problem often found in rural areas is that a lot of children never really have any interaction with anyone older than their teachers. "If you're not confident about having a conversation with somebody, and I think especially in rural areas, people have to move away to make a living, a good living, and therefore you're splitting family units up and they don't have the benefits of an extended family".

9 Discussion

9.1 What older people think?

Before turning to the discussion, we draw on the 'real voices' of older people which were given after the workshop event on this comparative research with the Berwick University of Third Age⁶⁹, on 23rd April 2009. The workshop was organised as a special event for the group, where the Newcastle team gave a presentation of Japanese case study to stimulate the discussion with thirty members on how we could respond to ageing society. After the workshop, a questionnaire survey

⁶⁹ <http://www.berwicku3a.org.uk/info.php> (accessed on 18 June 2009)

was circulated to the participants, nine of which were returned. The University of 3rd Age⁷⁰ is a self-help organisation formed in the UK in 1982 providing educational, creative and leisure opportunities in a friendly environment for people no longer in full time employment. It consists of local U3As all over the UK, which are charities in their own right and are run entirely by volunteers. Berwick U3A, formed in 2003, is a learning cooperative which draws upon the knowledge, experience and skills of their own members to organise and provide interest groups in accordance with the wishes of the membership. With over 180 members, the Berwick U3A organises more than 25 activities, ranging from painting, gardening, a book club, to a dining club and theatre visits (some weekly, others fortnightly or monthly) at various venues. It is worth noting that most of the questionnaire respondents were relatively new residents in Berwick (moving within the last 3-5 years), however they seem to be actively involved in the U3A and other local activities. The following comments are, therefore, biased to some extent, but they are the people who chose to move to Berwick when they were reaching retirement age and therefore it is anticipated that they could give us both objective and subjective views on how Berwick is (or could be) an age-friendly town from their everyday experiences.

People were asked following four questions:

- 1) What lessons might be learned from the Japanese approach to ageing?
- 2) How can society meet the two challenges - firstly making use of the resource that older people represent and secondly meeting the needs of growing numbers of frail elders?
- 3) What value do we place on later life - what might be the goal and purpose for individuals?
- 4) How can Berwick become an age-friendly town? Do you think your voice is adequately heard? What kind of ways would best facilitate older people's engagement in helping Berwick deliver better quality of life in later life?

To the **last question of the age-friendliness in Berwick**, answers were mixed. Some of respondents stated "I believe Berwick is already age friendly (people friendly). There are several organisations which have local interests at heart. Berwick is a generous town which supports many charities, but people only have so much time to give as its difficult to see what could be done"; "I do not agree that Berwick should try to be age friendly, but be friendly to people regardless of age"; "in my opinion Berwick scores quite highly in being age friendly with kindness and politeness in the streets and shops". Most of people think Berwick as 'people friendly' and not specifically oriented as 'age-friendly' place. Many request "better public transport" and some are concerned about the safety issues in the neighbourhoods: "our surroundings are very important to us, and could be greatly improved if we were all aware to help keep our town clean & attractive. A lot could be done to educate children at school – bin rubbish, no chewing gum. Being polite should be taught at home and school. Often building plans for the town are not well thought out, not listening to peoples views".

⁷⁰ <http://www.u3a.org.uk/> (accessed on 18 June 2009)

The most profound comment given by the respondents was about the negative attitudes towards ageing prevalent in society. "The English place little value on being old"; "In this country one becomes invisible after age 60"; "our society hasn't adapted to the ageing society"; "Older people are, of course, a monetary drain on society"; "Old people are regarded (rightly in some cases) as out of touch and a nuisance", and there was no comment to suggest that older people are well treated and regarded by the society. These negative attitudes lead to criticising the public policy: "Our Government will not change their attitude towards older people. They (Conservative or Labour) will not expend more money for the old population. At the moment they cannot afford to, and already think they spend too much on hospitals, medicines and care in home". And at the same time, "we seem to have landed in a very top heavy bureaucratic system which creates the idea that the needs are being met, but results in huge amount of waste". "Most politicians/planners make their own decisions on what they feel people need and this occurs with every age group. Such 'Leaders' do not live with the people, therefore do not accept a knowing, understanding of life situations and needs. Urbanisation and crowding will be the norm. As facilities become available only in large centres, forethought and forward planning are in very short supply". Ageism is rampant, particularly in work places. Older people's "experience is under-valued and wasted". Therefore they require "no compulsory retirement at 60 or 65" and "useful, suitable employment – perhaps part-time / voluntary / paid – be 'organised' in a more productive way – expensive to set up, but gainful over time. In some situations the payment could be paid back into needed requirements for a 'later' age group".

How can societies make use of the resource that older people represent? The answer is simple: "Ask older people what THEY WANT. Let older people have real input into society". To achieve this, it is important to create opportunities for older people to remain in work or take part in volunteer activities, and to "encourage learning about modern technology – courses readily available – free". Various activities the U3A provides are "an excellent answer allowing us to lead groups or take part in groups helping our well being" and "an excellent opportunity to make friends and learn new things, language, dancing, book groups, music appreciation, choirs etc. The most you can expect of 'elders' is that they keep using their faculties and keep the burden of care down". However there is a criticism of the idea of making use of older people's resources. One responded that "the idea that 'society' regards me as a 'resource' and wants to 'make use' of me sounds like something from the thinking of a 19th Century work house committee. Before society can meet the needs of frail elders, it has to acknowledge that we are still INDIVIDUALS, with many different levels of dependence and, most importantly, independence. The tendency for medical and social welfare services to plan their programmes on a 'one size fits all' basis is both depressing and infuriating. Yes, some of us are physically challenged, but we still have all our marbles [wits and intelligence]. Yes, some of us are a bit slow on the uptake and have 'senior moments', but we're not necessarily ga-ga [suffering from dementia]. Recognise and respect the individuals".

So **what value do we place on later life – what might be the goals and purpose for individuals?** One says: “individuals should have their own goals and purpose for living at any time during their lifetime. Society cannot place a value on an individual’s later life”. It is interesting to see that most respondents say: to be “as independent as possible”, to remain “active for as long as possible”, and to be “a useful member of the community for as long as possible” are the goals and purpose for individuals. What makes individuals ‘independent’ depends on the personal abilities or conditions in “finance”, “health”, “family relationships”, and perhaps “education”. An adequate income, good health, good contacts with the family, and good contacts with friends and neighbours are the key to successful ageing. Ironically, in spite of these images of successful ageing, ageism persists – a frail and incapable body is seen as a nuisance to society. People who are dependent on others are not individuals that society values. Indeed there are disconsolate responses to the needs of growing numbers of frail elders: “there is no answer except reduce the numbers of frail elderly, keeping old people alive artificially makes no sense”; if I had a pet, terminally ill and suffering, the vet would painlessly put it out of its misery. A human being must endure it all. I think in future ‘living wills’ will receive greater respect & allow terminally ill & suffering ‘elders’ to be set free”; “inevitably society must consider Euthanasia, whether voluntary or compulsory. With world population extending at an uncontrolled rate, older people must give way to the young. This has to happen sooner or later, probably within this Century”.

9.2 The voice of older people to be heard

Northumberland is a predominantly rural county with a dispersed population with an ageing profile and which has undergone reorganisation of local government in recent months. Firstly it is important to note the **potential impact of local government re-organisation on service provision** in a rural county like Northumberland (this impact has not yet been fully realised). Some of the impacts are discussed in the following interview quotes:

“We don’t have an issue with Local Government Reorganisation because we are part of the NHS. In fact it will make our job easier. Dealing with six districts can be very difficult because it’s inconsistent. The reunification will be good. Housing will be under one banner, prior to that we’ve had six different local authorities planning housing. The Northumberland Housing Board has been in operation for three years, and it has worked very well. When the Supporting People team put the next five year strategy together, the Housing Board will be very involved. In a way the unification of Housing was the forerunner of local government unification. The representatives from six districts were involved. They had to put their six bids together and work together. That can only be a positive. [Supporting People]”

“I think our hugest challenge is the fact that we’ve lost a lot of smaller pots of money, for example Alnwick District Council used to give a business start-up grant, and it was only £500, but it was £500

to every business that started up that wasn't a B&B, and that £500 gave people a bit of seed money, you know, it gave them a bit of cash flow and they could buy some equipment with it, and it was...But all that's stopped now. it was a very easy process to access, and you... so hopefully, the unitary authority will make opportunities more readily available to anyone, no matter where they are, but at the minute we're not seeing... they've got bigger problems haven't they, of trying to sort their staff out and... but longer term, I hope it provides more opportunities for everyone, whether they're in Newbiggin or whether they're in... Alnwick District Council and Berwick District Council focused on the town and not on the hinterlands, and the hinterlands really are the places that...", [NNBSL]

As acknowledged here, whilst this re-organisation is likely to bring some benefits, including more streamlined working across the county as a whole and access to new funding streams, it is also likely to result in challenges for organisations in having to work within new arrangements. Citizens within Northumberland, and particularly its remoter areas, may feel more remote from decision-making and harder to have a voice at the new authority's 'centre of power'. Whilst this on the face of it represents a potentially negative impact of re-organisation, it may open up the door for individuals and communities to be innovative and creative in responding to the advantages and disadvantages of an ageing population profile, as in the Bell View Resource Centre in Belford, for example.

A second theme that has emerged from the fieldwork is that of **older people bringing vital resources to rural communities**, either in terms of mentoring and supporting new businesses or contributing through part-time or voluntary work as carers for example. Shifts in terms of national policy, such as towards more target setting for public services and personal care budgets have implications everywhere, but it is vital to monitor how well such new schemes operate in the UK's rural areas like Northumberland where the costs of delivery are usually higher. As noted earlier, these personal budget schemes have the potential to open up new opportunities in rural areas for those who do not want full-time work but still wish to contribute in caring roles. Organisations such as Carers Northumberland provide good examples of how support can be provided to carers themselves, who may face isolation when living in rural communities.

The monitoring (or rural proofing) task for such new initiatives becomes even more important in the context of the Government's new emphasis on mainstreaming – ensuring that the policies and processes that are developed are designed effectively to meet the needs of people living throughout the country, recognising that all communities are different. It is argued that mainstreaming (alongside an increasing emphasis on local devolution) gives local areas the flexibility to respond to local circumstances and needs, although how well this works in reality is still to be determined.

A third theme is that of **housing**. This is perhaps the most important challenge facing many rural communities in the UK. A combination of low housing supply (due to a restrictive planning system) and high levels of demand has meant that housing is out of the reach of many people working in rural communities. Although the influx of wealthy, older in-migrants has fuelled this problem in many rural communities, for those older people who have always lived and worked locally (perhaps in the agricultural, retail or public sectors, where wages are low) finding local housing of an adequate when they reach retirement may be a serious challenge. On the basis of Matthew Taylor's report and the positive Government response to most of his recommendations, there are likely to be changes to the planning system in the UK to make it more flexible and responsive to local need and to allow for some house building in the countryside, but it will take time for such fundamental shifts in planners' mindsets to become reality on the ground in terms of new house building. There is a continued need for detailed, regular housing needs surveys across Northumberland to ensure that the housing provided serves the needs of all those who require it, including older people and those with housing adaptation needs.

A fourth theme is **the need for collaboration and communication**. Firstly, between service providers operating across different sectors, including housing, care and support services and business and economic regeneration. Secondly, between all stakeholders, including landowners (who often represent important providers of housing in rural communities), the community and voluntary sector and business and employment support services and thirdly, between all departments in the new unitary authority. The need for an holistic approach is recognised in the following quote:

"There are problems such as the fact that the DWP and the different benefit agencies are not connected. The man on the ground is dealing with five or six different agencies. There could be significant changes by central government to improve this." (Carers Northumberland)

The fifth theme to mention is **the need for the right attitudes to prevail**, in relation to a variety of different issues highlighted throughout fieldwork. Firstly, in relation to the contribution that older people can continue to make to the communities in which they live and the need to treat people as individuals, with differing levels of dependence and independence in later life. Several U3A questionnaire respondents noted the negative attitudes towards older people and ageing that are prevalent in UK society. Secondly in relation to rural living – we need to see a loosening of the NIMBY attitude seen in many rural communities which has effectively served to reduce the likelihood of economic and social development taking place (by encouraging a more and more restrictive planning system), thus reinforcing the domination of the UK countryside by wealthy middle-class incomers. A more sustainable countryside requires mixed communities, both in terms of age and social class and in terms of housing and business premises. As mentioned by NBSL, a change in attitude with regard to business may be required in rural areas. Home-based working is very prevalent in rural locations but currently falls under the radar of much business support (Commission for Rural Communities, 2005). There is a need to ensure that this economic activity is

better recognised so that business owners get the support they require and can make a full contribution to the economies in which they live.

The final theme to mention is the need to ensure that **the voice of older people and other user groups is heard** when services are being planned and introduced as well as in the delivery of the services themselves (as in the case of the Supporting People 'key ring' service or the Service User Forum in Hexham, for example). Older people's views must be given more respect and outlets are required for such views to be expressed. Such actions can benefit society as a whole, and older individuals themselves.

10 Conclusion

This report has discussed the results of case study research in Date City, Hokkaido, Japan and the county of Northumberland in the North East of England. Evidence gathering in the Japan and UK case studies included exploring relevant strategy and policy documents and interviews with representatives of service providers from a range of sectors, including housing, business support and older people's services. The final section of this report draws together the main findings into four thematic discussions.

(1) The social integration of in-migrant older people in rural places

In the UK, the number of older people who migrate to rural is substantial. Whilst acknowledging that this can have negative impacts on the area they are moving to, such as raising house prices, there are a lot of senior citizens, who are physically healthy and mentally active, willing to participate in the voluntary work and to devote their knowledge and skills to local community activities. A wide range of voluntary and community groups (the third sector) across the country enable these older in-migrants to get involved in local activities. The high number of older people who commit themselves to local voluntary work may be associated with the fact that UK government has advanced privatisation of public services, and voluntary work is expected to fill the gaps where public services are no longer available. The private sector, on the other hand, has not positively advanced the employment of older workers, who want (or need) to continue working for a variety of reasons (i.e. income, to make a social contribution or to keep active). As a result, for most older citizens the third sector is the main contact point with wider society.

In Japan, compared with the UK, retirement migration to rural areas has not yet become mainstream, although there have been an increasing number of promotions and advertisements encouraging it in the media in recent years. Moreover, the third sector in Japan has not been developed to the same extent in rural areas as in the UK. This results in a low participation level by older people (particularly new retirement in-migrants) in voluntary activities, despite the fact that their levels of willingness and social concern are high. Taking account of the fact that retirement rural in-migration (particularly amongst the baby boomer generation) is a new phenomenon, those who have made this happen seem to want to enjoy their 'golden time' just relaxing peacefully after a long, hard working life. Nevertheless, as seen in the UK, social welfare services in Japan are inevitably under pressure due to the combination of an increasing number of older people and declining tax revenue. To make up for the gap, private sector investment in welfare services is currently encouraged. Social welfare reform in Japan is geared to private sector initiatives targeted at wealthy older consumers. This tends to cause differential service provision for older people – the richer the pensioners the more they benefit, with the relatively poorer retirees losing out. It is, therefore, necessary to enhance all of the sectors (public, private and third sector), that

contribute to older people's welfare, as the point of contacts through which older people connect to wider society. In particular, older people's activities and experiences in the third sector could offer good reference points from which senior citizen welfare policy/business in the public sector and the private sector should learn. If the aim is to provide efficient and effective welfare services, in both private and public sectors, the most important thing is to get older people involved in both policy-making and business development.

(2) The relationship between social inclusion of older people and their quality of lives

Evidence suggests that there may be a positive relationship between the richness of an older person's social contacts and the healthiness of their mind and body. Conversely, this means that older people who are socially excluded are more likely to decline quickly. Both in the UK and Japan, some older residents in rural areas, where less public transportation and fewer public and private services are available, can easily become socially isolated. There is a higher risk that those older people become physically and mentally frail. It is therefore significant to improve participation opportunities for older people at local level, to prevent a growing number of frail older people. Both the UK and Japanese case studies illustrate that due to strict regulations and control on adult social care and medical care by central government, innovative local initiatives (such as community development, community businesses and housing projects) to generate effective services tend to be patchy and difficult to integrate with social care/medical services for older people. Since the current social care reforms are direct towards prevention measures, by which medical costs and the number of hospitalised older people can be reduced, an overall policy for older people should encourage the social participation of older people, and build an effective relationship between the social care sector and other sectors (community development, business and economic development – including housing, transportation, and cultural development).

(3) The impact of increasing retired in-migrants on the existing rural communities

Increasing retirement rural migration has positive impacts on the rural communities to which older people move. Their aspirations and political presence can bring more attention to the existing older population and their actual and potential needs, which are often neglected by policy makers. To respond to the older people's needs, new business opportunities ought to be created. Older people are key members of local community/voluntary groups, and they know how community development can work well with other sectors (care services and economic development etc). Older people themselves may become local social and economic entrepreneurs. Their voices may trigger public debates on social welfare for multi-generations. In the UK, youth unemployment has recently (once again) become a prominent social problem, and in Japan, there are an increasing number of young people who are described as 'NEET' (Not in Employment, Education or Training) or – in Japan – 'freeters' (youth who move from one casual

and insecure job to another, and are frequently unemployed). Despite the fact that these young people – after school or university education and before employment – are desperate to access employment or career development, effective support mechanisms are lacking in both UK and Japanese societies. Older people, particularly currently retiring baby boomers, who are at the transitional life stage between employment and retirement, can become mentors for younger people, making the best use of their experiences and skills.

(4) The implications of the retirement rural migration for local identity-building and place-making

People change the place in which they live depending on their life stage. It is a big challenge for local authorities to build policies that have immediate impacts for existing residents but also potential incoming/outgoing populations in the future. Given that both UK and Japanese governments seem to be continuing to promote devolution, social welfare reforms should be tailored to each locality, in line with local circumstances, rather than being forced as a national standard. This is because each locality varies in the degree to which its population is ageing, and more importantly, in the attitude and capacity of local communities to respond to an ageing society. In general, a negative attitude towards ageing can be seen in the UK, while Japanese society finds positive values in becoming old. Identity development in later life depends much on personal attributes (such as wealth, education, health, family relations), however, the environment or circumstances that surround older people also have significant impacts on older people's identity development and their quality of lives. If 'being independent individuals' is an ultimate goal of life, 'individuals' must be recognised as 'individuals with dignity' in society and embedded in the place where they are living. In this context, local identity-building and place-making are particularly deeply associated with personal welfare for older people and this must be built in to any policies and strategies for local development.

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Appendix

Japan Case Study Visit Schedule (1)

| Date | Activity |
|------------|--|
| Wed 2 July | Arrival at Narita (Tokyo International Airport) |
| Thu 3 July | Departure from Haneda Domestic Airport Arrival at Shin-Chitose Airport, Hokkaido 16.45 Arrive at Hotel Garden Palace 17.15-19.15 [Round-Table Discussion] Sponsored by: Hokkaido Migration Promotion Committee (HMPC) and Yomiuri News Paper Coordinator: Mr Iida, Head of Editorial Division, Yomiuri New Paper Panellists: Nina Glasgow, Cornell University Rose Gilroy, Newcastle University Professor Hisashi Inoue, Hokkaido University Shinsuke Ohyama, Senior Policy Officer, Hokkaido Prefecture Government 7.30 pm: Welcome reception at Hotel Garden Palace |
| Fri 4 July | [Date Visit, organised by Prof Setoguchi, Hokkaido University] 08.30 Mini-bus pick up to Date City 12.00 Arrival at Date City and Lunch 13.00-14.30 Visit housing projects for older people and migrants in Date City 15.00-17.00 Discussion at Date City Council 15.00-15.45 Short presentations (15 minutes each) <ul style="list-style-type: none"> - Date City's policy and strategies for promoting in-migration and integrated social care (Mr Kamada, Date City Council Policy Officer) - Rural migration in rural England (Jane Atterton) - Rural migration in rural America (Nina Glasgow) 15.45-17.00 Discussion 17.00 Depart for Sapporo 18.30 Arrival at Hotel |
| Sat 5 July | [Naganuma Visit, organised by Mr Hirofumi Iwai, HAL] 08.30 Mini-bus pick up to Naganuma Town, 10.00 Arrival at Naganuma Town 10.00 Meeting and discussion with Naganuma representatives Short presentations by: <i>Mr Komatani</i> , Chairperson of the Naganuma Green Tourism Committee. <i>Town Council Officer</i> , Industry Promotion Division. 12.00 Visit (1) social care facilities – <i>Geiko-en</i> , a care service complex including care homes, day care, short stay, care service delivery centre. 13.00 Lunch at "Harvest", one of Naganuma successful agri-tourism examples! Possible attendees: <i>Naganuma Art Council members, Akiko Aratani & Epp Raymond</i> (Owner and Founder of Menno Village Naganuma, CSA), <i>Mr Nakano</i> (Owner of Nakano Fruit Garden) 15.30 Visit (2) CSA farm, Farmers market 17.30 Depart Naganuma for Sapporo 19.00 Arrival at Hotel |
| Sun 6 July | Departure for Tokyo/Seoul |

Members of the UK Delegation

| Name | Affiliation |
|-------------------------------------|---|
| Rose Gilroy, Senior Lecturer | Global Urban Research Unit, School of Architecture, Landscape and Planning, Newcastle University, UK |
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| Dr. Kayo Murakami, Researcher | Centre for Rural Economy, School of Agriculture, Food and Rural Development, Newcastle University, UK |
| Liz Brooks, PhD Student | School of Architecture, Planning and Landscape, Newcastle University, UK |
| Professor David Brown | Department of Development Sociology, Cornell University, USA |
| Dr. Nina Glasgow, Senior Researcher | Department of Development Sociology, Cornell University, USA |
| Professor Haruhiko Goto | School of Architecture, Waseda University, Japan |

Japan Case Study Visit Schedule (2)

| Date | Activity |
|----------------|--|
| Thu 15 January | Arrival at Narita (Tokyo International Airport) |
| Sat 17 January | Seminar at Waseda University |
| Sun 18 January | Departure from Haneda Airport (Tokyo) Arrival at Shin-Chitose Airport, Hokkaido Train to Date City 18.00 Meeting with Mr Ohshima, Date Funkawan Cultural Institute |
| Mon 19 January | 10.00 Interview with Mr Abe, JA Date [Agriculture sector] 15.00 Interview with Mr Kataoka and Ms Shinomiya, Landic Co. [Real estate sector] |
| Tue 20 January | 10.00 Interview with Mr Azuma, Ohtaka Co. [Food sector] 14.00 Interview with Mr Kikuchi, Kitayuzawa Rehabilitation Centre [Social Care sector] |
| Wed 21 January | 10.00 Interview with Mr Izumi, Care Home OhTaki-no-mori [Social Care sector] 15.00 Interview with Mr. Abe, Vice-mayor of Date City 19.00 Meeting with members of Committee for Creating Wealthy Town |
| Thu 22 January | 10.00 Interview with Mr Ohshima, Date Funkawan Cultural Institute 20.00 Meeting with Mr Ohyama, Hokkaido Prefectural Government |
| Fri 23 January | Departure for Tokyo |

Member of the UK Delegation

| Name | Affiliation |
|----------------------------------|---|
| Dr. Kayo Murakami, Researcher | Centre for Rural Economy, School of Agriculture, Food and Rural Development, Newcastle University, UK |

UK Case Study Visit Schedule 2009, by Newcastle University Team

| Date | Activity |
|-----------------|--|
| Thu 19 February | 13.30 Interview with Marshall Sisterson, Supporting People Manager, Northumberland Care Trust [Social Care sector] |
| Tue 3 March | 10.30 Interview with Rohit Marwah, Head of Operations, Berwick Borough Housing [Housing sector] |
| Wed 4 March | 13.00 Interview with Sandi Downing, Manager, Carers Northumberland [Social Care sector] 15.00 Interview with Jane Field, Services Development Manager, Bell View Resource Centre Belford [Social Care sector] |
| Tue 14 April | 14.00 Interview with Brian Renforth, Regional Manager, Johnnie Johnson Housing |
| Wed 15 April | 10.30 Interview with Melanie Thompson-Glen, Business Start Up Adviser, Northumberland Business Services Ltd |
| Tue 21 April | 11.30 Interview with Sue Marrs, Transformation Agenda project manager, Northumberland Care Trust |
| Thu 23 April | 10.00 Meeting with the Berwick University 3 rd Age at the Maltings Arts Theatre, Berwick upon Tweed Short presentation by Rose Gilroy and Kayo Murakami |