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1992-1994 RESEARCH AGENDA

BY PETER SAUNDERS

At its December meeting the SPRC Management Board approved a new Research Agenda for work in the Centre over the next three years. This new Agenda has grown out of the research program pursued over the period 1989-91, maintaining continuity in some areas while setting new directions in others.

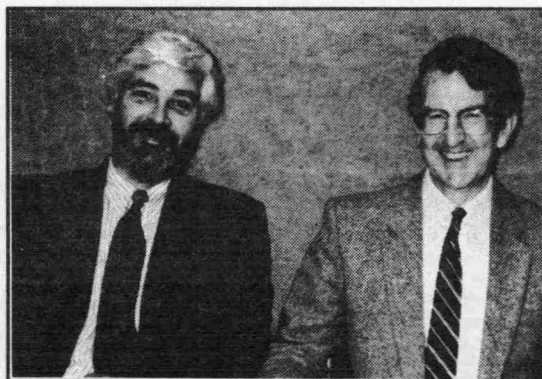
OVERVIEW

What follows outlines the broad parameters which will determine the research strategy to be pursued in the Centre over the next three years, specifies the actual research agenda and the existing and proposed research projects contained within it. Interested readers can consult previous issues No. 21 (March 1986) and 33 (May 1989) of the SPRC Newsletter for a description of the earlier triennial agenda for the periods 1986-89 and 1989-91, respectively.

the research strategy relates to the total research effort of the Centre

The total research effort of the Centre comprises three elements: in-house research funded from core funds guaranteed under the Agreement between the Commonwealth and the University governing the Centre's operations; research specifically commissioned by the Department of Social Security (DSS) - also guaranteed under the Agreement - and, in 1991-92, by the Department of Health Housing and Community Services (DHHCS); and external contract research. The proposed research strategy relates to

the total research effort of the Centre, although the Agenda and specific projects proposed later relate only to the first of these elements, the in-house research component. This has, however, been designed after taking account of likely developments in the other two research components and of their relation with the in-house Agenda.



(from left) Peter Saunders, Director
and John Lawrence, Chairperson of the
Management Board

It needs to be emphasised at the outset that the Research Agenda is not intended to be absolutely 'set in concrete' and that opportunities exist within it for flexibility in the assignment of resources. Experience in the past indicates a need for a degree of flexibility if the research of the Centre is to have maximum impact on evolving social policy issues and be of relevance to new and emerging research and policy issues. Such flexibility will, however, operate primarily 'at the margin' and will not disrupt the main core research effort proposed here.

When the last SPRC Research Agenda was approved in 1988, it represented a significant departure from previous periods, when various life cycle categories had been used to structure the research agenda. These were replaced in 1988 by an Agenda comprising the following four main research areas:

- 1 Poverty, Inequality and Standards of Living
- 2 Social Security, Taxation and the Labour Market
- 3 The Welfare State
- 4 Community Support Services

the same four main Research Areas organise the Centre's 1992-94 Agenda

Experience over the last three years has shown that the organisation of the Research Agenda into the four Areas indicated earlier has worked well. The four Areas have served to organise the separate projects in train in the Centre in a way which is ordered yet flexible. The Areas are defined sufficiently broadly so as not to exclude any major areas of research and it is relatively straightforward to assign each of the

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Centre's contract research projects to one of the four main Research Areas. For these reasons the Centre will use the same four main Research Areas to organise its 1992-94 Research Agenda.

THE 1992-1994 AGENDA

There now follows a brief outline of the existing projects underway in each of the four Areas and an indication of what new projects are envisaged for the next triennium. It should be noted that in terms of the resources devoted to them, each of the four Areas is of approximately equal size.

1 POVERTY, INEQUALITY AND STANDARDS OF LIVING

(Research Team Leader:
Peter Saunders)

The prime focus in research in this area is on the investigation of alternative conceptual approaches to the measurement of income, living standards, poverty and inequality and their application to the investigation and monitoring of trends in each among the Australian population. The research mainly utilises

survey data collected by the Australian Bureau of Statistics (ABS), complemented by projections derived from the Centre's modelling work (see below). These data are complemented in some areas by data collected by the Centre and are analysed in a comparative context by comparisons with similar data for other countries. This Area currently comprises the following five projects:

Poverty Lines: The Consensual Approach - an attempt to derive a set of poverty lines for Australia from community perceptions of minimum levels of income adequacy.

Income Distribution and Redistribution

in Australia - on-going analysis of the extent and determinants of changes in income distribution in Australia in the 1980s, using data from successive income surveys undertaken by the Australian Bureau of Statistics.

An International Comparative Study of Poverty, the Labour Market and Income Support Policies - examination, using comparative data from the Luxembourg Income Study (LIS), of the role of employment and wages in preventing poverty among working age families and the role of income support in this context.

Trends in Family Disposable Incomes - use of microanalytic simulation modelling techniques to investigate trends in family incomes and the impact of demographic, labour market and income changes on those trends.

Microdata Estimates of the Size Distribution of Cash and Noncash Income in Seven Countries - comparative analysis (using the LIS database) of inequality and poverty using both disposable (cash) income and a measure of full income which incorporates estimates of the value of noncash education and health benefits.

Of the existing projects, the first and the fifth are virtually complete, and the final reports from both should be released during 1992. It is proposed to recast the fourth project so that its focus becomes the development

of microanalytic modelling which will then produce results for use in a whole range of Centre research (see also Area 2 below). This new project will be called *Development of a Microsimulation Model of the Australian Income Distribution*.

Two new projects are envisaged in this Area for the coming triennium. The first, *The Concept, Measurement and Causes of Poverty* will investigate approaches to poverty measurement which are both methodologically sound while of practical use for policy analysts, welfare groups, and so on. The focus of the project will be broad, addressing the issues of living

standards, choices and constraints in life styles and the causes of poverty.

The Concept, Measurement and Causes of Poverty will study poverty measurement

A second proposed project on *The Distribution of Income Among the Elderly* will investigate developments during the 1980s in the level and distribution of income among the elderly population as well as changes in income composition. It is proposed to adopt both a cohort and synthetic (simulated) longitudinal framework to analyse specifically changes to the social security and private superannuation systems on the living standards of the elderly.

2 SOCIAL SECURITY, TAXATION AND THE LABOUR MARKET

(Research Team Leader:
Anthony King)

The focus of research in this Area over the past three years has been on evaluating the redistributive impacts of policy, with particular emphasis on the interactions between the social security system, the taxation system, and the labour market. To this end, research has been concentrated in three areas:

- evaluation of particular aspects of income support, taxation and labour market programs;
- research on universality and selectivity in income support, providing theoretical background to the unique extent of means-testing in the Australian system of income support; and
- the development of sophisticated micro-modelling capacity to allow detailed evaluation and simulation of the social security system, the income taxation system and labour market and how these combine to affect trends in living standards, poverty and income distribution.

Because the great majority of past work in this Area has either been



(from left) George Matheson, Diana Encel, Peter Saunders and Bruce Bradbury

completed within the last year or transferred to other Areas, an almost complete re-design of the Agenda in this Area is now proposed. The program will retain an emphasis on the redistributive impacts of policy, with particular regard to the interactions between different policy areas. However, it is also proposed that additional focus be provided to the research through the identification of two new themes of current policy importance: the growing importance of the two-earner couple, and the need for a longer-term view in policy analysis.

One existing project in this Area which will continue into 1992 and beyond is *The Costs of Children*. It is envisaged that future work on this project will focus on two main issues, the use of budget data to estimate family equivalence scales and a review of methods of accounting for differences in family needs when making inter-temporal or cross-national comparisons of inequality. Two other projects, previously allocated to this Area, have been transferred to other sections of the Research Agenda. *Universality and Selectivity in Income Support: An Assessment of the Issues* will continue under Area 3, while research on *The Life Cycle of Families* is now taking place as part of the Study of Social and Economic Inequalities (see below).

new projects proposed are The Rise of the Two Earner Couple and Social Policy Futures

The new projects proposed in this Area are:

The Rise of the Two Earner Couple - a review of labour market trends in recent decades with a view to highlighting implications for the social security and taxation systems of the increased prevalence of two earner families. The analysis will consider the equity and efficiency effects for the population as a whole of past trends, analyse the possible policy responses to those trends, and give particular attention to the question of social rights.

Social Policy Futures - The objective of this project will be to develop a picture (or set of pictures) of the social outcomes over the next 15-20 years which are implied by likely developments in the Australian economy and society, and on the basis of alternative assumptions about policy across a range of areas. Much of the work will entail the synthesis of research undertaken elsewhere on aspects of the future. The unique contribution of this research will be the establishment of a framework on which to draw together work in a number of areas into coherent and internally consistent descriptions of what our future may look like under different assumptions.

Micro Model Development - this project will expand the range of modelling considerations contained in past and proposed modelling work in the Centre - see Area 1. Specific considerations which will be addressed are wages, population and labour market

structure, indirect taxation and assets. By improving and expanding the model (or by linking it in with models developed outside of the SPRC) it is envisaged that the usefulness of this work will be improved by broadening the range of policy and other issues which can be addressed.

3 CITIZENSHIP, SOCIAL RIGHTS AND THE STRUCTURE OF THE WELFARE STATE

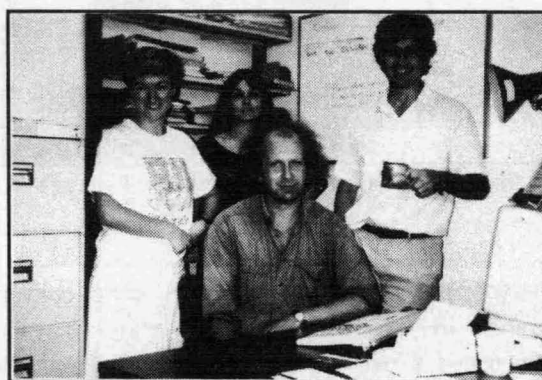
(Research Team Leader:
Sheila Shaver)

This Area of research is to be fundamentally reformulated for the coming period, in order to take account of changes taking place in the structure of the Australian Welfare State and of recent developments in international scholarship. This change in focus is signalled in the change of name for this Research Area from *The Welfare*

State to Citizenship, Social Rights and the Structure of the Welfare State. The 1989-1991 research program on *The Welfare State* has been largely completed. During 1991 projects on *The Social Wage, Provision and Utilisation of Human Resources in Community Services, The Cost of Compensation, and The Scope and Impact of Occupational Welfare* have been concluded or nearly so.

The postwar Welfare State has been commonly understood as shaped by a 'class settlement'. Whether or not this account was adequate for that period, it is increasingly clear that the contemporary Welfare State cannot be understood in the one-dimensional terms of class alone. As

in other contemporary Welfare States, the period since the mid-1970s has seen Australian social policy under continuing reconstruction. Factors contributing to these changes include



(from left) Toni Payne, Jenny Doyle, Bruce Bradbury and Anthony King (seated)

economic restructuring in an increasingly international context, newly emergent patterns of work, family and gender relations, and the fragmentation of class politics by more fluid, pluralistic groupings defined by income, education or ethnic identity and personal commitments to moral values and ideologies.

The research program for this Area will be focused on the exploration of issues arising in key areas of change in social need, political mobilisation and social policy arrangements. The distinguishing features of this perspective are comparative analysis, a focus on welfare provisions as establishing social rights of citizenship, and the economic and political implications of their particular institutional forms.

It is thus proposed that over the long term, and perhaps extending beyond the forthcoming three year period, the research program in this Area will be framed as three complementary and theoretically interlocking sets of studies:

- studies of the Australian Welfare State in comparative international context;
- studies of social rights and citizenship in everyday life; and
- studies of the institutional structures of policy development and administration.

The project *Universality and Selectivity in Income Support: An Assessment of the Issues*, has been transferred to this Area. The objective of this project is to review the arguments in favour of a universal or a selective (means-tested) approach to the provision of income support. The project involves a review of the arguments commonly put forward in favour of universal and means-tested provisions respectively, but will seek to test the validity of these arguments in an international comparative perspective. This project has been relocated from the Research Area on *Social Security, Taxation and the Labour Market* to reflect its conceptual emphasis and staffing responsibility.

the research is to contrast the sense of right attached to different forms of support

A second existing project, *The Gender Regimes of the Liberal Welfare State* is a comparative study of gender in the Welfare States of Australia, Canada, the United States and Britain. The project will develop comparative data for a group of countries having 'liberal' Welfare States, i.e. offering relatively limited social protection designed to minimise interference with market mechanisms. Though broadly similar in political culture, these countries differ in the way

men, women and family units are treated in their welfare arrangements. This project was described in *SPRC Newsletter No.40*, March 1991.

Two new projects are proposed for this Area during the forthcoming triennium. The first, *Planning Retirement Income* is to be a fieldwork study of middle-aged persons and married couples, examining their expectations concerning anticipated age of retirement and future

eligibility for the age pension, current savings practices including saving through home purchase, superannuation and other assets, and the use of tax concessions in planning for their income in retirement. The



(from left) Marina Paxman, Marilyn McHugh and Sheila Shaver

research is to contrast the senses of legitimacy and right attached to different forms of saving supported from the public purse. Qualitative study of this kind will complement quantitative work undertaken in the Centre and elsewhere monitoring response to public policy initiatives.

In relation to research on the structure of the Welfare State, a second new project on *The Changing Nexus of Public and Private Provision in Welfare* is proposed. In Australia as elsewhere, issues concerning 'privatisation' and the appropriate relation between public and private welfare provision have arisen across the spectrum of Welfare State activity, including social security, health, housing, education and employment services. These issues concern not only the balance between public and private sectors but also the emergence of new modes of integration between them.

4 COMMUNITY SUPPORT SERVICES

(Research Team Leader:
Sara Graham)

The research program outlined for this Area is, in broad terms, a continuation of

the program agreed for the 1989-1991 triennium. Like that program, the research will be concerned with community support services for elderly people and people with disabilities. It will examine the impact of government programs of domiciliary and community support for these groups and for their carers.

given a choice, it seems that most people with severe disabilities would prefer to live at home

Community care is an area of government policy in which the apparent preferences of the people and the interests of government happily coincide. Given a choice, it seems that most people with severe disabilities would prefer to live at home. Government policies currently give effect to the view that people should live at home rather than in residential care facilities and that only people who need continuous medical or nursing care or whose needs for support cannot be provided by family, friends or neighbours, or even by some combination of government funded services and support provided by informal carers, should be eligible for a place in a residential care facility, provided or subsidised by government.

The existing research program in this Area was designed to address three broad questions:

- How are the needs of people with disabilities and their carers being met and at what cost?
- How do organisations which provide domiciliary support allocate this and how satisfactory are these arrangements from the point of view of the service agencies, service providers and services users? and
- How viable and how adequate are the various arrangements for domiciliary care?

The research was intended to address these questions through three specific core research studies:

- i) A *Community Study* which would describe the domiciliary services available to people with disabilities and their carers and establish what factors appear to influence the level of

use that dependent people and their carers make of these services. Whilst most studies of this sort are confined to existing users of services, the purpose of this project was to select a population with disabilities from the community and to examine their patterns of coping, including service use.

- ii) A second project was designed to examine *The Structure and Organisation of Domiciliary Services and the Relationship between these and their Users*. The problems for users of services are often explained in terms of the way services are funded and co-ordinated within a given locality. Further questions are raised as to how service providers plan their use of resources and allocate their services. It was intended that this project, like the former, would be locally based, would provide a detailed mapping of service provision and look at the intersection of services and users, the relative contribution of formal and informal sources of support, and the degree of satisfaction with formal services.
- iii) A major goal of the Home and Community Care (HACC) Program and of other policy initiatives is to prevent inappropriate institutionalisation. The aim of the third project is to examine the *Factors which Precipitate a Move from Community to Institutional Care*. This project would be confined to people who have moved recently into some form of residential care and would uncover the full range of circumstances of those involved: the people who have undergone this move, their immediate relatives (or carers) and the service providers. The project would try to gain some understanding of the meaning of a move of this sort to those most closely involved.

a great deal has been learnt in terms of methodology and the broader social issues

It was decided in 1988 to undertake first the second of these three projects.

This project, which is entitled *Community Services and their Users*, is a three year longitudinal study of 60 people referred to a Rehabilitation and Geriatric Assessment Service in an urban locality in New South Wales. Its final phase is about to commence. A great deal has been learnt from this project both in terms of methodology and the broader issues involved in service provision and support for the frail elderly and people with disabilities.

It is now proposed to undertake the study of the *Factors which Precipitate a Move from Community to Institutional Care*, this, of the remaining two core projects, being the one with the greatest policy relevance at the present time. It also provides the greater possibility of examining the effectiveness of different forms of service provision and other forms of support. It is proposed for the forthcoming triennium to treat the two remaining 'core' projects as priority and to undertake the two new projects outlined below if and when resources permit.

The first of these new projects is *Factors Affecting the Effective Provision of Community Services*. Over the last two decades in Australia a pluralistic arrangement of provision has emerged in which locally based community organisations, large voluntary (or charitable) organisations such as the Smith Family and the Sydney City Mission, as well as profitable private businesses and re-organised, regionally-based State government agencies all provide some of the services now available.

This proposed project would involve intensive study of, and with, a small number of differently organised bodies to examine the factors which influence their effectiveness as providers of direct services to people who remain in their own homes. Use would be made of existing service records, including data on assistance provided to clients, as well as the minutes

of meetings and other documentation concerning the decision making procedures within the organisation. This would be supplemented by information obtained through interviews with staff and possibly by a limited amount of direct observation. The feasibility of interviews with clients and other service providers would also be considered.

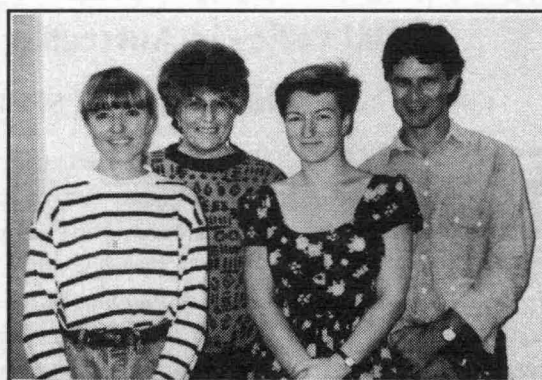
A second proposed new project is *Options for the Funding of Long Term Care*

in Australia: A Feasibility Study. At present there are several different funding regimes for each of the services which together make up the system of long term care, ranging from direct funding of nursing homes by the

Commonwealth to an unstable system of Commonwealth/State cost sharing in the field of the HACC program. Payments by service users vary considerably within and between the different programs, some of which are provided without cost, some with a fixed standard fee and others with a means-tested payment.

amongst the possible reform options to be considered would be a national insurance scheme

This project would examine future funding options across the broad range of services, including nursing homes, hostels and community support services for elderly people and people with disabilities in Australia. Amongst the possible reform options to be considered would be a national insurance scheme (comparable in some ways with Medicare), and a form of specially reserved levy or taxation, levied for example as national death duties or as a superannuation contribution.



(from left) Cathy Thomson, Sara Graham, Toni Payne and Michael Fine

NEW PUBLICATIONS

S O C I A L P O L I C Y R E S E A R C H C E N T R E

MORE CONFERENCE PUBLICATIONS

The second National Social Policy Conference, Social Policy in Australia: Options for the 1990s, organised by the Centre, held at the University of New South Wales from 3-5 July 1991 has resulted in a number of publications. Two publications, a special issue of the *Australian Quarterly*, and *Reports and Proceedings No. 96*, containing the papers delivered at the Plenary Sessions of the Conference, were described in *Newsletter No. 43*. Two further numbers in our *Reports and Proceedings* series are described below.

Social Policy in Australia: Options for the 1990s

Volume 2: Contributed Papers, SPRC Reports and Proceedings No. 97

EDITED BY PETER SAUNDERS
AND DIANA ENCEL

The 12 papers published in this volume are concerned with a range of issues related to the social security system and with income distribution. Papers deal with changes in this distribution and in the need for, and ways of, providing income support brought about by changes in demography and in government policy.

The papers included are:

Appropriate Income Support for Aboriginal Australians: Options for the 1990s, J. C. Altman

Financing Pensions with Population Ageing: Some Policy Choices, John Creedy and Margaret Morgan
Policy or Participation? Relative Income Shifts of Families with Children, and Elderly Households. New Zealand in the 1980s, Judith Davey and Des O'Dea
Inequality and the Wheel of Fortune: Systematic Causes of Economic Deprivation, Flora Gill
Social Security Cash Transfers, Income Taxes, and the Distribution of Lifetime Income in Australia, Ann Harding
Commercialisation of Government Business Enterprises: Implications for Disadvantaged Groups, Michael Howard
Implications of the Emerging Educational Markets, Simon Marginson

Long-Term Unemployment Benefit Recipients: The Impact of NEWSTART and Economic Conditions, David W. Kalisch
Applied General Equilibrium Modelling and Social Policy: A Study of Fiscal Incidence, G. A. Meagher
Recent Developments in Social Security in New Zealand: Old Times Revisited, Mike O'Brien
Aboriginal Economic Status by ATSIC Regions: Analyses of 1986 Census Data, Habtemariam Tesfaghiorgis
Who Pays for Community Care? Income Support and Caring, Cheryl Tilse, Linda Rosenman and Robyne Le Brocq

Volume 3: Contributed Papers, SPRC Reports and Proceedings No. 98

EDITED BY PETER SAUNDERS
AND DIANA ENCEL

The 13 contributed papers in this volume are concerned with a range of issues in social policy, both theoretical and practical, and demonstrate the links between the two. The papers included are:

The Aboriginal Community and Community Enterprise, W. S. Arthur
The Death of Mark Quayle: Racial Hatred, Medical Services and Law Enforcement in a Rural White Community, Kerry Carrington

What Do We Know About Social Democracy? Geoff Dow
An Analysis of Discrimination on the Ground of Age, V. Dharmananda and J. Williams
Respite for Carers: Some Policy Considerations, F. Ehrlich, G. Bowring, B. Draper, C. Poulos and R. Salgado
The Challenge of Commonwealth State Reform for HACC: A Better Outcome for Consumers, Jane Halton
Social Justice and ESL Provision in Melbourne: Some Considerations from the Literature, Bill Hampel
Social Policy and Citizenship, R. H. Tawney and T. H. Marshall Revisited, Trevor Hogan

State Wardship and Supervision and Youth Homelessness: Towards a Better Future, M. J. Liddell and C. R. Goddard
The Role of Funding Bodies in In-Service Training for the Non-Government Sector, Julie Nyland
The Child in Children's Services: Infrastructure for Social Justice, Frances Press
Consuming Mental Health: Democracy, Femocracy or Consumocracy? Miriam Solomon
Policy Horizons for Victorians with Disabilities: A Delphi Study, Michael Steer

Are Immigrants Over-Represented in the Australian Social Security System

Discussion Paper No. 31

BY PETER WHITEFORD

This paper discusses the statistics that are commonly used to assess whether immigrants are more or less likely than people born in Australia to be receiving social security. The paper shows that many earlier discussions of this issue which have concluded that immigrants are substantially over-represented in the social security system have involved invalid comparisons. These have tended to systematically overestimate the extent to which immigrants receive social security payments and underestimate the level of social security receipt among the Australian-born population. The paper presents new estimates of receipt of social security payments in 1989 through a comparison of administrative data from the Department of Social Security and population estimates from the Australian Bureau of Statistics. The paper adjusts for the errors identified in earlier analysis of the issues. It concludes that while a relatively small number of overseas birthplace groups do appear to be more likely to be receiving social security payments, the extent to which this occurs is much smaller than previously estimated. It also concludes that most groups of immigrants appear to be less likely to be receiving social security payments than are people born in Australia.

SUBSCRIPTION

Readers are invited to subscribe to Subscription Series No. 6 which commenced with the publication of SPRC Reports and Proceedings No. 94 and SPRC Research Resource Series No. 8. The Series will comprise 15 publications (SPRC Reports and Proceedings and SPRC Research Resource Series) and is offered at the special price of \$120.00.

PUBLICATIONS ORDER FORM

SPRC REPORTS AND PROCEEDINGS

No. 96 Peter Saunders and Diana Encel (eds) *Social Policy in Australia: Options for the 1990s, Proceedings of National Social Policy Conference, Sydney, 3-5 July 1991, Volume 1: Plenary Sessions, December 1991, 84pp. \$9*

No. 97 Peter Saunders and Diana Encel (eds) *Social Policy in Australia: Options for the 1990s, Proceedings of National Social Policy Conference, Sydney 3-5 July 1991, Volume 2: Contributed Papers, February 1992, 191pp. \$9*

No. 98 Peter Saunders and Diana Encel (eds) *Social Policy in Australia: Options for the 1990s, Proceedings of National Social Policy Conference, Sydney, 3-5 July 1991, Volume 3: Contributed Papers, February 1992, 194pp. \$9*

THE AUSTRALIAN QUARTERLY Special Issue

Peter Saunders and Diana Encel (eds) *Social Policy in Australia: Options for the 1990s, Spring 1991, Volume 63, No. 3, \$7*

DISCUSSION PAPER

No. 31 Peter Whiteford *Are Immigrants Over-Represented in the Australian Social Security System, March 1992, 32pp. Free.*

6TH SUBSCRIPTION SERIES

This series commences with SPRC Reports and Proceedings No. 94 and SPRC Research Resource Series No. 8 (comprising 15 publications) - \$120

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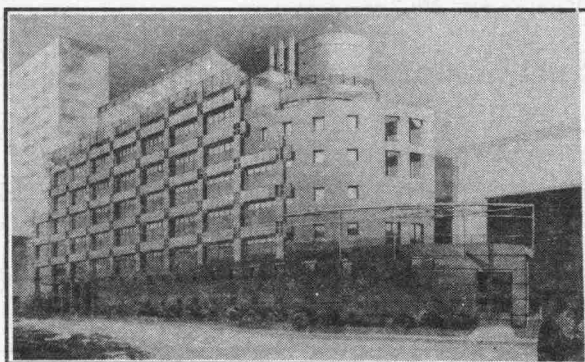


The Social Policy Research Centre (originally the Social Welfare Research Centre) was established in January 1980 under an agreement between the University of New South Wales and the Commonwealth Government.

The Centre is operated by the University as an independent unit of the University. The Director of the Centre is responsible to the Vice-Chancellor. The Director receives assistance in formulating the Centre's research agenda from a Board of Management, and in periodic consultation with the community.

The Centre undertakes and sponsors research on important aspects of social policy and social welfare; it arranges seminars and conferences, publishes the results of its research in reports, journal articles and books, and provides opportunities for postgraduate studies in social policy. Current research areas cover poverty, inequality, and standards of living; social security, taxation and the labour market; the welfare state; and community support services for the frail elderly and younger people with disabilities.

The views expressed in this Newsletter, as in any of the Centre's publications, do not represent any official position of the Centre. The Newsletter and all other SPRC publications present the views and research findings of the individual authors with the aim of promoting the development of ideas and discussion about major concerns in social policy and social welfare.



The Social Policy Research Centre is now located on Level Three of the University's New Research Building which can be found just inside Gate 11, off Botany Street, opposite the Australian Graduate School of Management and the University Parking Station.

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FROM THE DIRECTOR

S O C I A L P O L I C Y R E S E A R C H C E N T R E

The early months of 1992 have been characterised by a new vitality of political debate in this country, spurred on no doubt by thoughts of the next federal election due in about a year's time. Economic recession and rising unemployment have seen a renewed interest in economic policies appropriate to deal with the former and social policies for the latter. The recent debate between **Fightback!** and **One Nation** epitomises what may be a stark choice facing voters at the next election.

What is most interesting about this debate - and most refreshing - is the implicit acceptance it reveals on the part of both major political parties that government intervention does have the potential to have significant and permanent effects on the course of economic activity. No longer do we hear the voice of those who, so recently it seems, dominated economic debate by arguing that government macroeconomic policy was irrelevant to the economic outcomes which would emerge as the natural consequence of market forces. This new acceptance of the potential efficacy of macroeconomic policy is a step forward from the barren mainstream debates which dominated during the eighties.

If economic policy debate is on the up, the prospects for social policy do not seem quite as good. As both parties continue to clamour for political support by offering tax cuts, overall fiscal considerations will inevitably continue to translate these into expenditure restraints which in turn heavily constrain what social policies can achieve. That is a great pity, as the depth and length of the current recession call for renewed efforts to ensure that those who suffer do not do so without a sense of hope that their plight will be only temporary. Successful economic policies may be their best ultimate saviour, but these need to be buttressed by social policies which relieve immediate suffering while facilitating and assisting the transition back to improved economic performance.

NEW RESEARCH AGENDA

I made reference to the Centre's new Research Agenda in our last Newsletter and have described the new Agenda in some detail on pages 1-5 and 12. A longer version of the new Agenda is available on request from those readers who wish to find out more about the Centre's proposed research strategy over the next three years.

1991 ANNUAL REPORT

As I write this, the final revisions to the Annual Report for 1991 are in train and the Report will be released shortly. As in previous years, the Annual Report will be sent automatically to all people who receive the SPRC Newsletter.

The Report describes the whole range of Centre activities undertaken during 1991, including research, conferences, publications, teaching, staff development and the visitors program. There is also for the first time the presentation of a limited set of performance indicators which have the potential to assist in assessing the effectiveness of the work of the Centre and track it over time. If you know of colleagues who might wish to receive the Annual Report but have not yet done so, contact the Centre on (02) 697 3857 for additional copies. Comments on the content and presentation of the Report are, of course, welcome.

STAFF

- Cathy Boland resigned from the Centre in February to take up a teaching position at the Cumberland College of Health Sciences. Her project on Child Health and Socio-Economic Factors will now be conducted from Cumberland College.
- Nicky Woodburn resigned in February in order to undertake study in nursing at the University of Technology, Sydney.
- Finally, Jennifer Young our Publications and Information Officer resigned in March to pursue her career in acting.
- It is sad to have to say farewell to three colleagues in such a short space of time. Jenny Young, in particular, will be missed by all of us as a friendly and enthusiastic member of our team. Many of you will have spoken to her directly over the last few years and will know first hand of the care and respect with which she undertook her job. She first joined the Centre in 1982 and leaves many friends behind her. I wish her, as well as Cathy and Nicky, the very best wishes in their new careers.
- Alan Law has returned to the University of Alberta in Canada to complete his PhD dissertation on work testing and the social identity of the unemployed.
- Sue Brown has joined the Centre as a Commonwealth Rehabilitation Service Trainee and is working in the Library and with the Community Support Services team. She will be with us for a period of three months.
- Thanks to Toni Payne for the photos used in this issue of the Newsletter.

Peter Saunders
Director

BOOK REVIEWS

S O C I A L P O L I C Y R E S E A R C H C E N T R E

CHANGING WORK AND RETIREMENT

SOCIAL POLICY AND THE OLDER WORKERS

FRANK LACZKO
CHRIS PHILLIPSON

Open University Press, Buckingham, 1991,
150pp. RRP \$34.95 Paperback.

Reviewed by Sol Encel

The authors of this book are both well-known students of ageing and retirement. Phillipson, in particular, has published several works in the field since his first book, *Capitalism and the Construction of Old Age* (1982), which was unusual in its application of Marxist concepts to a subject whose literature is still largely descriptive.

retirement is a socially constructed process

Given Phillipson's earlier writing, it is not surprising that this book adopts a 'political economy' approach to the subject. On this view, retirement is a 'socially constructed' process which is only partly due to the inevitable effects of ageing. To use a distinction made by Rousseau many years ago, retirement has both 'natural' and 'conventional' factors. The political economy model, according to the authors, focuses on the way in which retirement is shaped by the social structure and by the social and economic factors which affect the individual's place in that structure, with special emphasis on the 'impact of social class, gender and race on the experience of retirement'.

One of their aims is to shift the centre of interest in social gerontology from examining adjustment to retirement to a study of the socio-political factors which influence retirement outcomes.

The book, in fact, mainly deals with the phenomenon of early retirement and its significance in terms of labour market changes since about 1970. The authors are concerned to demonstrate that many

older workers have been pushed out of the labour force, not into a secure and tranquil retirement, but into long-term unemployment or into forms of non-employment such as long-term disability. (A similar debate took place in Australia a few years ago involving writers like Windschuttle, Woodland and Gregory and Stricker.) Hence, the argument runs, the distinction between 'voluntary' and 'involuntary' retirement is disappearing, and the basic concept of retirement needs to be rethought.

One characteristic of this new phase is that a gap has emerged between the end of employment and the receipt of a state pension. Indeed, according to an official definition of early retirement, published by the British Department of Social Security in 1990 and quoted by the authors, 'early retirement means retirement before state pensionable age'. This definition, they argue, is confusing because it fails to note that the gap between retirement and pensionable age covers a wide range of situations. It is necessary, therefore, to distinguish between 'early exit' from employment and 'early retirement' as such.

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The fall in labour force participation which is generally attributed to early retirement is a much more complicated phenomenon. The status of older people, many of whom now find themselves in an 'intermediary' stage between work and retirement, is now highly ambiguous. This ambiguity, in its turn, reflects the ambiguity of public policy towards older

people.

Having established the distinction between early exit and early retirement, the authors then devote six chapters to demonstrating the character of early exit and its effect on the individual. This involves a historical review of British social policy relating to pensions, disability benefits and withdrawal from the work force. They identify four exit routes which have developed since about 1970:

- occupational pensions;
- public pre-retirement release schemes;
- unemployment; and
- disability.

women are less likely to describe themselves as retired

This range of processes underlines the inappropriateness of the conventional term 'early retirement' to describe what is actually happening. In particular, the blanket use of this term obscures the large class and sex differences which apply to 'retired' people. Men in the upper social classes (I and II according to standard British usage) are much more likely to describe themselves as retired than those from other groups (manual workers in particular) among whom there is a much higher incidence of 'unemployment' and 'disability'. Women are much less likely at any age to describe themselves as retired; in one major survey, only one-third of women over 60 did so, and among women aged 74 only 56 per cent regarded themselves as retired. (Linda Rosenman's study of women in Queensland aged between 45 and 75 produced similar findings.)

As far back as 1975 Dorothy Wedderburn noted the growth of inequalities in later life based on factors such as class position, technical skills,

and inherited wealth, or privileges acquired during working life. Laczo and Phillipson are concerned about the failure of social policy to deal with these inequalities, which have increased in importance partly because of social change and partly because of the steady growth of the older age

groups. Employers remain reluctant to retain or retrain older workers; educational opportunities for older people remain restricted; and in general, there has been a failure to 'develop a vision about what life in retirement could be about, given appropriate resources and imagination'.

The applicability of these conclusions to Australia is obvious. Greater prosperity and a younger population have meant a much slower response to the impact of retirement in general, and early retirement in particular, than in Britain.

CLASS ANALYSIS AND CONTEMPORARY AUSTRALIA

EDITED BY
J. BAXTER ET AL.

Macmillan, Melbourne, 1991, 394pp.
RRP \$29.95 Paperback.

Reviewed by George Matheson

This book, edited by Janeen Baxter, Michael Emmison, John Western and Mark Western, presents the major results from an empirical study of Australian society in the mid-1980s from the perspective of class analysis, that is, the form of sociological inquiry which seeks to understand various aspects of people's lives in terms of their location in the central economic relationships characterising the societies in which they live. The authors present some fascinating research findings regarding the empirical salience of class structure in Australia, and in the process offer an impressive coverage of issues in the contemporary theoretical literature, including some significant original contributions.

The authors discuss the significance of class in such areas as: the labour process and the 'politics of production', job satisfaction, income inequality, social mobility, social networks, gender inequalities, the household division of labour, the construction of people's social identities, and the long-running debate concerning the relationship between class and politics. In short, *Class Analysis and Contemporary Australia* covers a lot of ground. Although there are useful insights to be gleaned throughout the book, the couple of points to follow should be taken to reflect simply space limitations and the particular interests of this reviewer.

Chapter 13, for example, looks at the

structure of social identities, that is, the relative importance of factors such as class, gender, race, age, religion, nationality, family membership, occupation and a number of others in people's images of themselves. The results indicated that class as such did not figure prominently in respondents' self-concepts, and certainly not as compared with such other identifications as their nationality, occupation and membership of a family group. However, the analysis went beyond this to look at the relationships among the different sources of personal identity. Much of the existing literature on class identification consists of asking respondents whether (for instance) they think of themselves as 'middle class' or 'working class' and stopping at that, leaving the reader with the maddening question of 'yes, but what did they mean by "middle class"?'. The present study makes a notable contribution to this area by demonstrating that respondents tended to associate their 'class' identity with their other ascriptive characteristics like race, ethnicity, gender and age, rather than with their work-related attributes of occupation, union membership *et cetera*.

class as such did not figure prominently in respondents' self-concepts

A similar degree of methodological and theoretical refinement can be found in the authors' more general treatment of the interrelationships among class situation, class consciousness and political attitudes and behaviour. They argue that

attitudes and beliefs do not simply reflect positions in a social structure, but also the activities of political parties and groups, and the resultant currency of particular ideas. If the public do not on the whole think or act in class terms, it is likely to be because such conceptual categories are not prominent (at least these days) in the language of Australian political or industrial life. As Adam Przeworski once wrote, the 'class struggle' is *about* class before it can be *between* classes.

it should not be assumed that class is irrelevant

Having said this, however, it should not be assumed that class is irrelevant. For if models of class structure give an adequate account of the way in which resources and capacities are distributed, then the patterning of perceived interests will bear some relationship to this, even if the language in which they are thought about and expressed is not specifically one of class. The results on voting behaviour and political attitudes are consistent with this. It comes as no surprise, for example, that employers and the self-employed are on average more hostile to trade unions, government intervention and the ALP than are any category of employees!

In summary, read this book. Regardless of whether your attitude to class analysis is that of a lifelong leftist, a post-modern pluralist or a bemused bystander, there is something of interest in it for you.

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SUMMARY

This outline of the SPRC Research Agenda for the coming three years addresses a very broad range of social policy issues. It contains both quantitative and qualitative research, builds upon empirical and theoretical frameworks, and incorporates data analysis and data generation endeavours.

Overall, its aim is to shed light on the major social policy concerns of the day without losing sight of longer-term questions nor of the need for analysis to be conceptually vigorous, methodologically sound and theoretically informed.

contract research is focused on issues of current policy relevance

It was noted earlier that the proposed Agenda relates only to that part of the Centre's total research effort which is funded from the core budget. The two other main elements in the overall research program for the Centre are research undertaken specifically on commission to Government Departments like DSS and DHHCS, and research undertaken on contract to other external funding bodies. This research is more focused on issues of current policy relevance and includes evaluative studies of existing programs and, more generally, analysis of the effects and effectiveness of existing policies.

Contract research is generally undertaken in areas where the Centre

either has clear expertise or where the project is complementary to some aspect of the existing in-house research agenda. In some instances, skills and expertise developed in the course of pursuing in-house research (e.g. modelling work or the design and implementation of survey questionnaires) have borne fruits in terms of the Centre's ability to bid competitively for external contract research.



(from left) Judy McHutchison, Robert Urquhart and Phil Raskall

One Area of research not described in detail here relates to the Study of Social and Economic Inequalities (SSEI) being undertaken jointly with the Centre for Applied Economic Research at

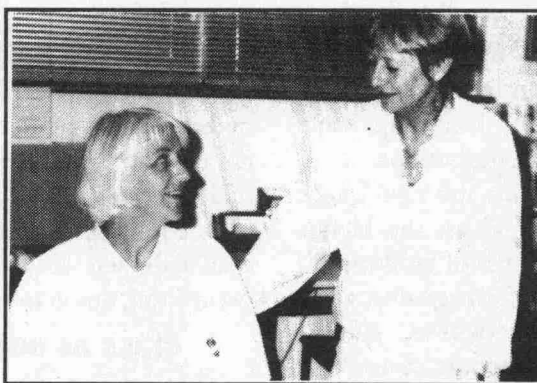
UNSW. This project, while clearly complementary to much of the Centre's in-house research, is a separately managed and funded exercise. Further details about the scope of work being undertaken in the SSEI can be obtained by contacting the Principal Researcher on the Study, Phil Raskall.

One final comment on the process of establishing the new Research Agenda relates to the very disappointing response to the efforts made last year to ensure wide consultation on the work of the Centre. Comment was sought through advertisement in the SPRC Newsletter and in the public press and a special

session was devoted to consultation during the Social Policy Conference held in July. With very few exceptions, for which I would like to take this opportunity to thank those responsible, both efforts produced very little feedback. This is a great pity, as we would greatly value more information on how the content of our research is regarded in the community generally. Those of you who have views on the new Agenda, or on how the consultation process could be designed so as to be more effective in future are encouraged to contact me.

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Despite this disappointment, the new SPRC Research Agenda promises to make the next three years in the Centre lively and stimulating. The Agenda not only fulfils the Centre's charter but will, I believe, produce research that will be of use in understanding Australian society, and how it is changing, help identify the forces shaping that change and analyse the



Support staff: (from left) Lynn Sitsky, Librarian and Suzanne Vaughan, Administrative Assistant

consequences of it. Readers who wish to obtain more information than is included here are encouraged to contact me and/or the relevant team leaders indicated in this article.