

CONCEPTUAL DIAGRAM FOR THE ELDERLY: AN ANALYTICAL METHODOLOGY FOR THE VISUALIZATION OF COMPLEX PROBLEMS WITH TERRITORIAL CLUSTER APPLICATION/PROPOSAL

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Abstract:

This paper contributes to the development of evidenced based European Policies for Inclusive Growth. In this regard, specific attention goes to improving the diagnosis, monitoring and evaluation of public policies, particularly those run under the European Funds Program "Portugal 2020", by applying high quality statistical systems, together with providing effective communication tools for a broader audience.

The 2012 European Year for Active Ageing raised awareness about the ageing issue and highlighted both challenges and opportunities associated with the elderly population's growth. Portugal is not only one of the EU's most aged countries (fifth highest in the ageing index) but also presents a situation of great concern regarding the social inclusion and quality of life of elderly persons.

Given this social context, our main objective is to present the conceptual diagram developed for the elderly population, meant as a structural and simplified visual display of the different needs and specific public responses to this population segment that provides an analysis and monitoring tool for public policies targeting the elderly.

In particular, our aims involve:

- i) describing an analytical methodology for the visualization of complex problems susceptible to replication in other fields, considered of major relevance in the analysis of the complex information returned by statistical indicator systems;
- ii) characterising in detail the topics presented in the diagram, and therefore supporting strategic monitoring and programming within the "Portugal 2020" and Post-2020 cohesion policy funds.

The presentation of the conceptual diagram comprises different phases: the definition of analytical axes (*resources* and *autonomy*, with respect to the elderly), the characterization of resulting quadrants (*the dynamic; the dependent; the unprotected* and *the disadvantaged*) and their typified situations, the portrayal of the evolutionary vectors besides the definition of the risks associated with each of the typified situations.

The quantitative measurement of this analytical framework also constitutes another part of this process. The definition of indicators relates to the delineated axes and quadrants. This allows for the characterization of profiles portrayed in the diagram according to the population sub-segments and territories.

Bearing this in mind, the analysis continues further in two directions:

- i) positioning the Portuguese elderly situation within the EU 28, based on the chosen axes for analysing the elderly. For the first purpose, the Poverty and Living Condition Indicator System (IPOLIS) is taken into account (<https://inclusivegrowth.be/project-output> and <https://inclusivegrowth.be/downloads/output/d20-1-ipolis-concept-paper.pdf>)
- ii) understanding differentiations within the Portuguese territory by portraying the distribution of the elderly profiles (based on the prevailing characteristic presented in the diagram's quadrants). Portuguese census indicators are applied to validate the methodology and strengthen the evidence based policies in this field of analysis.

Open questions remain regarding:

- i) finding indicators that are suited to measuring social development and the quality of life dimensions in depth (comprising both territorial and subject coverage detail);
- ii) listing the policies/measures that best meet the needs of the identified territories or the elderly population sub-segments, and interrelating them with the subsequently defined risks.
- iii) defining a monitoring indicator system for the listed measures.