The University Of Sheffield.

"Silver Linings Graybook":

A Comparative Study of Age-friendly Development in Hong Kong and Manchester

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A thesis submitted in partial fulfilment of the requirements for the degree of Doctor of Philosophy

The University of Sheffield
Faculty of Social Sciences
Department of Urban Studies and Planning

February 2022

Acknowledgements

It is beyond my own belief that I could possibly complete this PhD thesis, with all unimaginable changes of circumstances in the past years. This project would not have been possible without the support of countless people over the past four and a half years. First and foremost, my heartfelt gratitude to my supervisors, Professor Malcolm Tait and Dr Zheng Wang, for their invaluable advice, unwavering support, patience and faith in me throughout my PhD journey. Their reassurance and encouragement have been crucial especially at times when I have a lot of self-doubts. Malcolm has been such an incredible supervisor. The quality of this research has been greatly enhanced with his insightful comments. Zheng is more than just my supervisor. He is also a good friend and somehow a big brother to me, who is always generously sharing personal tips on my study, my career and my life. It has been a great pleasure to have been working closely with my supervisors throughout the journey. They are both truly the role model for a scholar and a mentor that I really look up to. My great appreciation to the Department of Urban Studies and Planning, particularly to Dr Glyn Williams, the co-director of the PhD programme. Glyn has been very helpful and responsive in providing assistance and signposting resources whenever urgently needed.

I would like to thank all the participants in both Hong Kong and Manchester who contributed to this research, for taking their time in participating in the interviews. Special thanks to the researchers of the Old Moat project and the JCAFC team, the neighbourhood workers from Southway, and the social workers from the Complex and the Sai Kung Community Centre. It would be impossible for me to reach out to more potential interviewees without your help. I would also like to express my gratitude to all the older people who took part in this project. It had been a wonderful experience listening to their inspiring life stories. The value of their sharing does not just limit to the research, but also to my own personal growth, which I am very grateful for.

This PhD journey would not have been easy without the support from all my friends. Despite the prolonged social restrictions as a result of COVID, I managed to build some valuable friendships during my PhD study, including Charlotte and Abdulla, who have been encouraging and supportive to me, especially when I felt frustrated during the write-up period. My great appreciation should also go to a number of important lifelong friends both local and abroad: Millie, Karen, Jenny, Ricardo, Roberto, Mitch and Valerie. Thank you very much for being there throughout the years, especially for the many late-night talks and phone calls.

I owe my deepest gratitude to my parents Ho-Tai Chan and Yin-Fong Cheng, and my sister Catherine for your unconditional love and support. You all are my biggest emotional anchor in life. Thanks for accepting me for who I am and providing me with all the freedom that I need to grow into the person I am today. A special thank you to my late sister Kathy. I know you are watching over me from above. Thanks for being the reliable and supportive big sister, so your little brother can go chase his dreams knowing that he always got your back. I hope I make you proud.

Last but not least, I would like to extend my sincere gratitude to my hometown Hong Kong, the place where I was born and raised in. Thanks for giving me some of the best memories in life and for nurturing me into the person who dares to be different. There are so many bits and pieces about this place that I shall never forget: the “ding-ding” sound of the tram, the briny smell of sea breeze, the stunning panoramic night view of the city overlooking from the top of Lion Rock, the labyrinth of narrow intertwining streets, the streetscape of kaleidoscopic neon lights… Thank you for everything. I am always proud to be a Hong Konger.

For my parents and my sister Catherine.

And in memory of my big sister Kathy, who left us way too soon.

For my most beloved Hong Kong.

Abstract

In face of global population ageing, the World Health Organization (WHO) launched the Age-friendly Movement in 2006 and developed the WHO age-friendly framework that is being widely adopted around the world. Although there is an extensive body of literature on age-friendly development following the WHO movement, limited discussion was on the process at the neighbourhood level, particularly in relation to the interplay of different stakeholders. To fill in this research gap, this study adopted a neo-institutionalist lens with elements of street-level bureaucracy in comparing the process of how age-friendliness is being enacted at the neighbourhood scale in Manchester and Hong Kong, through a comparative case study approach. This is the one of the first truly international comparisons on age-friendly cities of western and non-western contexts. Data was collected through document analysis, in-depth interviews and participatory observation.

The findings of this thesis document the process of age-friendliness at the neighbourhood level, with rich detail on the interplay of the different stakeholders involved. The major contribution of these findings is bringing a new perspective in understanding age-friendly processes by introducing the role of street-level bureaucrats (SLB), who are the determining agent in shaping how age-friendliness is being enacted at the neighbourhood level. Moreover, the findings in both cases also suggest an interdependent relationship between the processes at the city and neighbourhood levels. This thesis also suggests that the role of academics can be strengthened through a collaborative partnership of different stakeholders in developing age-friendliness at the community level. Finally, by contrasting the two case studies, it is shown that the ways of interpreting age-friendliness among different stakeholders vary place by place. This thesis hence concludes by suggesting age-friendliness as a fluid concept that should be embraced with a flexible mindset.

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List of Abbreviation

AFCC	Age-friendly Cities and Communities
AFC	Age-friendly City
AFCI	Age-friendly Community Initiatives
AFEAT	Age-friendly Environment Assessment Tool
AFGM	Age-friendly Greater Manchester
AFM	Age-friendly Manchester
AARP	American Association of Retired Persons
BGOP	Better Government for Older People
CI	Community Involvement
DC	District Council
DMW	District Minor Works
EC	Elderly Commission
GNAFCC	Global Network for Age-Friendly Cities and Communities
GMCA	Greater Manchester Combined Authority
HKCSS	Hong Kong Council of Social Services
HKJC	Hong Kong Jockey Club
JCAFC	Jockey Club Age-friendly City Project
LWB	Labour and Welfare Bureau
LingU	Lingnan University
MAFN	Manchester Age-friendly Neighbourhood
MAS	Manchester Age-Friendly Strategy
NHS	National Health Service
NORC	Naturally Occurring Retirement Community
NGO	Non-Governmental Organization
The Assembly	Older People's Assembly
The Board	Older People's Board
SK	Sai Kung
The Complex	Sheng Kung Hui Aged Tseung Kwan O Aged Care Complex
SSHSCC	Social Services & Healthy and Safe City Committee
SWD	Social Welfare Department
SLB	Street-level Bureaucrats
CUHK	The Chinese University of Hong Kong
PolyU	The Hong Kong Polytechnic University
HKU	The University of Hong Kong
THB	Transport and Housing Bureau
TKO	Tseung Kwan O
The Association	Tseung Kwan O Concern for Elderly Livelihood Association
UN	United Nations
VOP	Valuing Older People
WHO	World Health Organization

Declaration

I, Chak Yiu Carlo Chan, confirm that the Thesis is my own work. I am aware of the University's Guidance on the Use of Unfair Means (www.sheffield.ac.uk/ssid/unfair-means). This work has not previously been presented for an award at this, or any other, university.

CHAPTER 1
INTRODUCTION

1.1 Introduction

The world has been experiencing a global demographic shift in recent decades as seen in the form of population ageing and urbanization. According to the latest World Population Ageing report by the United Nations (UN) in 2020, there are currently 727 million people aged 65 or above globally. That is 9.3% of the total world population, and this figure is projected to increase to 16% by 2050 (United Nations, 2020). On the other hand, the global urban population keeps growing. By 2050, it is expected to reach around 68% of the world's population living in urban areas, as compared with 30% in the 1950s (United Nations, 2018). Hence, this dimension of global population has to be taken into account in modern day urban planning, and the issue being to find a sustainable approach to creating a livable urban environment that addresses and responds to this global population projections (Chao, 2018; Rémillard-Boilard, 2018). While many may see this as a challenge to our modern society, it creates opportunities for us to rethink and reshape our way of life in various aspects, such as healthier population, improving living environment, civic engagement and labour distribution in the global chain of production. In 2006, the World Health Organization (WHO) launched the Global Age-friendly Movement, as one of the strategies coping with the continuously ageing population. In the light of this, this research hopes to find out how to create a more age-friendly community through comparing the two case studies of enacting age-friendliness at the neighbourhood level. This introductory chapter shall set the scene for this research by providing a background of age-friendly development and its trend, as well as the development of age-friendly policies in Manchester and Hong Kong. Then the research aim, objectives and questions are discussed, followed by the significance of the study. In the final part of this chapter, the summary of each chapter will be outlined.

1.2 Background

In response to the increasing ageing global population, the WHO has been formulating various strategies to address this issue. Traced back to the 1980s, the WHO organized the United Nation First World Assembly on Ageing in Vienna in 1982, which is considered a significant milestone in ageing strategy development (Rémillard-Boilard, 2018). During the assembly, the Vienna International Plan of Action on Ageing was conceived and adopted (Rémillard-Boilard, 2018; United Nations, 1983). This action plan provided policy recommendations on a number of

areas such as social welfare, family, education, health and nutrition, housing and environment (United Nations, 1983). The Second World Assembly on Ageing was held in Madrid, 20 years after the first assembly by the UN General Assembly, with the purpose of reviewing the outcomes of the Plan of Action of 1982 (Rémillard-Boilard, 2018). Two policies were adopted in this Assembly, the Active Ageing Policy Framework and the Madrid International Plan of Action on Ageing (Rémillard-Boilard, 2018), which laid a foundation for the WHO to focus on "active ageing" in the following years. In the *"Active Ageing: a Policy Framework"* published by the WHO in 2002, WHO mentioned the term "age-friendly" in relation to promoting active ageing (WHO, 2002). Four years later, the WHO introduced the approach of "Age-friendly Cities and Communities" (AFCC) as their latest policy response to population ageing. In addition, the *"Global age-friendly cities: A guide"* was published in 2007, outlining the core features of an age-friendly city in eight domains (WHO, 2007a). This framework attempts to adopt a more holistic approach to age-friendliness, covering as many aspects in life as possible, which makes it one of the most commonly used guides in measuring levels of age-friendliness across the globe (Plouffe et al., 2016; Rémillard-Boilard, 2018). In 2010, WHO launched the Global Network of Age-friendly Cities and Communities (GNAFCC). For over ten years since its launch, the membership has been expanding, with 1,333 members spread across 47 countries by 2021 (WHO, 2021). Age-friendliness has become the global solution to ageing for cities and communities around the world.

There are a few places around the world that have been quick in responding to the Global Age-friendly Movement, such as the cities of Manchester and Hong Kong. The two cities are worth comparing mainly because there are very few literatures doing comparison between western and non-western contexts, making this study one of the very first comparisons of such kind. Nevertheless, both cities share a number of commonalities particularly in age-friendly development. Firstly, they are both the pioneers in their countries in adopting the WHO age-friendly framework into their own ageing policies. The city of Manchester joined the GNAFCC in 2010, while in Hong Kong, 17 out of 18 districts joined the GNAFCC up till this day, with the very first few districts joining the network in around 2014-2015. Significant efforts are shown in both places at different administrative levels in creating age-friendly environment for older people, both emphasizing a bottom-up approach in age-friendliness. In Manchester, the Manchester City Council has already developed their own ageing strategy, i.e., the Valuing Older People's Programme launched in 2003, even before the WHO framework was introduced. In Hong Kong,

the Hong Kong Council of Social Services[1] (HKCSS) initiated the city age-friendly movement in 2008, just two years after the launch of the WHO age-friendly Movement.

Being one of the world's densest cities, Hong Kong houses 7.34 million people in 2016 in an area of only 1,100 km^2, of which 1.6 million are older people aged 65 or above (Census and Statistics Department, 2018), comprising of 16.6% of the total population. The older population is expected to rise to approximately 2.37 million (31.1%) by 2036 (Census and Statistics Department, 2017a). Population ageing is not anything new in Hong Kong. In fact, prior to the WHO age-friendly movement, the Elderly Commission was established in 1997 to help formulating ageing policy (Elderly Commission, 2019). After the WHO age-friendly movement was launched in 2006, the concept was first introduced in Hong Kong in 2008 by the HKCSS, emphasizing a bottom-up district-based approach in developing age-friendliness (C. Sun Yi-Chen et al., 2018). HKCSS encouraged the 18 districts in Hong Kong to develop age-friendly communities in their own districts (J. Y. C. Kwok, 2018). In 2015, the Hong Kong Jockey Club Charities Trust[2] initiated the 5-year Jockey Club Age-friendly City Project (JCAFC), collaborating with four ageing research institutes from local universities, to conduct a city-wide age-friendly research project (Amoah et al., 2021; J. Y. C. Kwok, 2018; Phillips et al., 2018; Wen et al., 2021). These are all efforts made by bottom-up initiatives, while the Hong Kong government remains supportive to these works yet did little to take the lead. The AFC concept was only featured in the 2016 Policy Address as part of the policy agenda (A. Au et al., 2020; HKSAR Government 2016; Phillips et al., 2018; C. Sun Yi-Chen et al., 2018). That is the only age-friendly measure implemented by the government. Other than that, the age-friendly development work has mostly been done at the neighbourhood level.

Compared with Hong Kong, the city of Manchester has a much lower proportion of older people aged 66 or above, which is around 9% of the total population in 2020 (Wall, 2011). However, the older population is expected to increase by 19% by 2031, compared with the increase of only 7% from 2011-2021. The change is reflected by rising number of working age residents reaching older age in the coming decade, coupled with the rise in population from the "baby-boomers" (Wall, 2011). In the light of this, the city of Manchester has been proactive in preparing for an ageing population. Unlike Hong Kong with a stronger bottom-up effort, the city of Manchester is more of a combined approach of both top-down and bottom-up efforts, with

[1] The Hong Kong Council of Social Services (HKCSS) is a federation of non-government social service agencies established in 1947, representing over 480 agency members.

[2] The Hong Kong Jockey Club is a non-profit organization providing horseracing, sport betting and lottery entertainment, which returns over 80% of its revenue back to the society in the form of donations. The Charities Trust was established to administer all the donations.

Manchester City Council taking up a strong leadership (Buffel & Phillipson, 2018). Predating the WHO age-friendly movement in 2006, its Valuing Older People's Programme was launched back in 2003, under the Manchester Joint Health Unit under the Manchester City Council, with the aim of promoting "good quality of life in later life" through "a council-led partnership" of public sector agencies, charities, community groups and individuals. Throughout the years, they have set up a forum of older people's groups, a community development program, a representative older people's board, and a grant scheme that aims at developing these groups (Buffel & Phillipson, 2018; McGarry, 2018). As a result of all these works done, the city of Manchester was the first UK city to be the member of the GNAFCC in 2010, and they renamed their VOP Programme to Age-friendly Manchester shortly after. With strong political leadership and support from the Manchester City Council but equally representative older people participation, the age-friendly development in the city of Manchester is of a different nature from the process in Hong Kong. From the above overview of the two cities in age-friendly development, one could already notice the initial differences such as the top-down/bottom-up processes, but there are many more particularities in each case that makes them unique in their own ways, that will be explored in this research.

1.3 Statement of the Problem

The WHO age-friendly framework, as discussed above, is a widely adopted model in different places around the world. While the WHO age-friendly guide is a very comprehensive tool to measure and assess the level of age-friendliness, at the same time the WHO emphasizes the importance of bottom-up engagement. Moreover, the fact that the GNAFCC recognizes not only cities as members, but also communities and network affiliates, suggests that the Network encourages its members to share not only how age-friendliness is being implemented at the national/regional/city levels, but also at the community/neighbourhood level. For example, in Hong Kong, it is not the city government that applied to the GNAFCC, but applications were made by the district councils on behalf of their respective districts. Furthermore, the cities of Manchester and Hong Kong adopt different approaches in creating age-friendly communities. In Manchester, while the top-down leadership is pretty strong, there is equally active engagement of older people in the Age-friendly Manchester programme. Whereas in Hong Kong, even though there is a relatively ambiguous age-friendly strategy from the city government, the age-friendly works done by NGOs, and other community initiatives at the community level are still significant to the city's age-friendly development.

On the other hand, prior to the concept of age-friendliness, there are already similar concepts including the *naturally occurring retirement communities* (NORC)[3] (Hunt & Ross, 1990), *lifetime neighbourhoods* (Lui et al., 2009) and *elder-friendly community and liveable community* (Alley et al., 2007; Feldman & Oberlink, 2003; Hanson & Emlet, 2006). Unlike age-friendly *cities,* these terms all focus on the process at the neighbourhood/community level, instead of at the city level, implying that age-friendly works should stem from the neighbourhoods and communities. This is also reflected in a number of studies that looked at age-friendly neighbourhoods/communities. Some scholars addressed the importance of studying age-friendliness at the neighbourhood level as neighbourhoods are "where a great deal of [older people's] everyday life is spent and where social interaction happens" (Carroll et al., 2019; Domínguez-Párraga, 2019). They pointed out that even though the WHO model strongly encourages a bottom-up approach, it is still "directed top down" and fails to capture the diversity of the ageing population (Buffel et al., 2012, 2018; Carroll et al., 2019; Lui et al., 2009). In particular, Buffel's participatory research on co-production stressed the value of building on the key principle of the WHO model of prioritizing the participation of older people in developing action plan and research so as to improve their experience of living in their neighbourhoods (Buffel, 2015, p. 12). Phillipson further explained in this project the reason why it is essential to do participatory work with older people, because they are "the best group for reporting on the benefits as well as the frustrations experienced through living in a particular area" (Buffel, 2015, p. 16). The unique lived experiences of individuals are the key building blocks of defining and enacting age-friendliness on the ground, which justifies the study of age-friendly process at the neighbourhood level.

Among existing literature, there are a limited number of studies that analyze age-friendliness from the subjective perspectives of older people at the neighbourhood/community level (Conde et al., 2018; Domínguez-Párraga, 2019; Howell, 1983; Ronzi et al., 2016), and how this process affects the age-friendly process at higher level of governance (Brasher & Winterton, 2016). This is the central question that this research attempts to answer. Emerging from this central question are other associated questions that are also curious to the researcher, such as

[3] Naturally occurring retirement communities (NORC) was a term coined by Hunt & Gunter-Hunt in the United States in 1986 as "housing developments that are not planned or designed for older people, but which over time come to house largely older people" (Hunt & Gunter-Hunt, 1986). It is later often associated with supportive service programs, as a response to supporting this kind of unplanned older people community. Borrowed from New York City NORC model, it refers in this thesis to the social group of older people in Old Moat that was established as a result of Old Moat research project and continues to operate under the age-friendly neighbourhood team of Southway Housing till this day. More details are discussed under 5.3.2 in Chapter 5.

what does it mean to be age-friendly? How to do it right? Is the age-friendliness practiced on the ground different from what is being laid down in the age-friendly policy from top down? These questions address this gap in neighbourhood study of age-friendliness and age-friendly process that this research tries to fill in – the understanding of age-friendly process at the neighbourhood scale through digging into the details of actions and behaviours of the neighbourhood stakeholders and relating the neighbourhood process to the city-wide process.

1.4 Research Aim, Objectives and Questions

With the above questions in mind, this research attempts to provide a better understanding of the age-friendly process at the neighbourhood level in relation to the wider policy context. With that said, the following research aim, objectives and questions are formulated accordingly.

Research aim

To investigate the process of age-friendliness at the neighbourhood level in Manchester and Hong Kong

Research Objectives

1. *To compare and examine how "age-friendliness" is interpreted and enacted at the neighbourhood level in Manchester and Hong Kong*
2. *To compare and analyze how age-friendliness is being governed at the neighbourhood level in Manchester and Hong Kong*

Research questions

1. *How do different stakeholders understand age-friendliness in Manchester and Hong Kong?*
2. *By what means are age-friendly initiatives governed at the neighbourhood level in Manchester and Hong Kong?*
3. *How do different actors/stakeholders enact age-friendliness at the neighbourhood level in Manchester and Hong Kong? How do processes of enacting age-friendly initiatives at the neighbourhood level relate and interact with those at the city-wide level?*

Here is a note to clarify a few terms here. By "interpreted" it refers to the understanding of the concept of age-friendliness; "enacted" should be understood in relation to the interpretation of age-friendliness, in other words, how the interpretation of different stakeholders and the interactions of these stakeholders shape the process of age-friendliness within the two neighbourhoods; "governed" here refers to examining what formal and informal rules and regulations, together with the contextual factors that are at play that influence the decisions and behaviours of different stakeholders.

1.5 Significance of the study

In attempting to explore the questions stated above, this research adopts a neo-institutionalist lens, which allows the researcher to look into the age-friendly processes in both cities through identifying the different stakeholders of the age-friendly development process, examining the informal rules and norms that are invisible in the formal social systems of rules, values and norms, but govern the actions and behaviours of different stakeholders, which in turn shapes the entire age-friendly process. By exploring the case studies in two different neighbourhoods in Manchester and Hong Kong, this study is able to present a detailed narrative of the age-friendly processes in the two neighbourhoods of Tseung Kwan O, Hong Kong and Old Moat, Manchester, which very few studies in the past have done. More importantly, being one of the very first international comparisons on age-friendliness, this study provides significant insights on how different places implement and enact age-friendliness differently, despite being under the same umbrella of the WHO model. The aim is not to provide a generalization of how the WHO framework can be carried out effectively, but rather to explain how age-friendliness can be implemented effectively in meeting older people's needs, in relation to different political, economic and socio-cultural contexts. Lastly, this study also wishes to highlight the particularly significant role of street-level bureaucrats (SLBs)[4] in the age-friendly development at the neighbourhood level, which has not been addressed nor discussed in existing literature.

1.6 Structure of the thesis

This thesis is divided into seven chapters. **Chapter 1** gives justification for this research, by providing a background on the global ageing population, the age-friendly trend, the age-friendly development in Manchester and Hong Kong, and explains the research aim, objectives and

[4] Street-level bureaucrats (SLBs) is a central theme in this thesis in understanding the age-friendly development process in Manchester and Hong Kong. It is a concept developed by Lipsky in 1969 in understanding policy transfer through examining the work of public service workers who work directly with services recipients (Lipsky, 1969, 2010). More details about SLBs are extensively explained under 2.7.2 in Chapter 2.

questions, as well as significance of this study. It highlights the importance of studying age-friendliness at the neighbourhood level. The last part of the chapter is the summary of each chapter.

Chapter 2 reviews the existing literature on age-friendly cities and communities (AFCC) and provides the theoretical framework of the study. The chapter starts by introducing the WHO Age-friendly framework and its significance on the global age-friendly development. Then it moves on to give a review on international AFCC literature categorized into four themes, namely 1) conceptualization of AFCC, 2) implementation and development, 3) assessment and measurement and 4) challenges and opportunities, in which the chapter specifically focuses mainly on 1) and 2), and comparative studies on AFCC. Then the research gaps identified from existing literature will be presented. The chapter then moves on to set out the theoretical backbone of this study. The two theories neo-institutionalism and street-level bureaucracy are explained, followed by the theoretical framework with the two theories being the overarching themes.

Chapter 3 describes the research methodology of this study, by first outlining the research philosophical approach, including the ontological and epistemological assumptions. Then the research design and strategy were set and grounded by the philosophical assumptions discussed, which is a comparative case study approach. The chapter goes on to explain how triangulation of data helps answer the research questions through multiple methods of data collection. The research findings of the study are based on exploratory investigation (in the form of document analysis), in-depth semi-structured interviews, and participatory observations. Data was analyzed using thematic analysis, with the process of themes development explained. The chapter ends with the ethical consideration detailing the ethical approval details by the University.

There are three empirical chapters in this thesis, with Chapter 4 on the Hong Kong case, Chapter 5 on the Manchester case, and Chapter 6 the comparison of the two cases. **Chapter 4** is the first of the three empirical chapters looking into the case study of Hong Kong. The background of the age-friendly process at the city level in Hong Kong is laid out, including measures done by both the city government and other stakeholders. It then moves on to discuss the case study of Tseung Kwan O, Sai Kung, detailing the story of the Tseung Kwan O Association of Concern for Elderly Livelihood (The Association)[5], explaining how age-friendliness is being implemented at the neighbourhood level. It highlights the empowerment of older people through two major incidents

[5] The Tseung Kwan O Association of Concern for Elderly Livelihood (The Association) is a neighbourhood elderly initiative formed by a group of older people who are closely associated with the district elderly centre in Tseung Kwan O. This initiative is central to the case study of Tseung Kwan O and the age-friendly development in the community, which is discussed further under 4.3.3 in Chapter 4.

the Po Lam Road North Incident and Duckling Hill "Uprising". The findings of the case study are then discussed, focusing on the role of street-level bureaucrats (SLBs), in relation to the other stakeholders in shaping the age-friendly process in the case of Sai Kung District.

Chapter 5 seeks to provide a better understanding of how age-friendliness was implemented in Manchester, through discussing the case of Old Moat in relation to the age-friendly development at the city level. The chapter starts by explaining the top-down age-friendly strategy and development in the city of Manchester. Then the Old Moat project and the later development of the Naturally Occurring Retirement Neighbourhood (NORC) in Old Moat after the project are presented, with a focus on how the SLBs contributed to shaping the age-friendly process at the neighbourhood level. Then this chapter moves on to discuss the findings of the case study and the implications.

Chapter 6 is the comparison between the cases of Manchester and Hong Kong. From the two cases, a number of similarities and differences are identified based on the following four themes which are associated with the research questions: the adoption and adaptation of the WHO framework, age -friendly development at different levels of governance, the role of SLBs, and the role of academics in the age-friendly development process. Each of these themes is examined in detail. The chapter concludes by explaining briefly how these findings help answer the research questions, which will be further discussed in greater details in the next chapter.

Chapter 7 is the final chapter of this thesis. It starts by providing an overview on the research approach and framework, particularly how the neo-institutionalist lens helps to answer the research questions. Then it goes on to discuss the theoretical and empirical implications of the findings presented in the previous three empirical chapters, and the contribution to knowledge in responding to the gaps of existing age-friendly literature. The chapter continues by giving suggestions on future age-friendly policy and practice, as well as exploring future research directions based on the contributions of this study. Finally, chapter 7 concludes by suggesting that age-friendliness is seen as a fluid concept and our attitude towards it should also be fluid and flexible.

1.7 Conclusion

The introduction chapter aims at setting out the scene for this research, including providing a background of the potential challenges and opportunities brought by rapid urbanization and global population ageing, and the progress of the WHO age-friendly development throughout the years, as well as the current situations of Manchester and Hong Kong in terms of age-friendly development. This background helps to situate this research,

particularly an age-friendly study at the neighbourhood level. The comparative nature of this study also sheds new light on how neighbourhoods develop, redefine and implement their own version of age-friendliness under the same WHO age-friendly framework. It is believed that a detailed narrative of the age-friendly process at the neighbourhood level will be able to contribute to existing knowledge on how age-friendliness can be enacted within the communities, with the collaborative efforts of different stakeholders, particularly highlighting the central role of street-level bureaucrats in significantly shaping the age-friendly process at the empirical level. All these shall be unveiled in the following chapters, with details on the literature review, methodology, and empirical findings and conclusion.

CHAPTER 2
EXISTING AGE-FRIENDLY STUDIES SINCE THE WHO AGE-FRIENDLY MOVEMENT AND THEORETICAL FRAMEWORK OF STUDY

2.1 Introduction

Age-friendliness is a relatively recent concept that emerged in the 2000s, when the World Health Organization (WHO) first mentioned the term in their *Active ageing: a policy framework* published in 2002 (WHO, 2002). Prior to that, there were similar terminologies adopted in different places, such as *naturally occurring retirement community (NORC)* (Hunt & Ross, 1990), *elder-friendly community and liveable community* which are more widely used in North America (Alley et al., 2007; Feldman & Oberlink, 2003; Hanson & Emlet, 2006), and *lifetime neighbourhoods*, which was more commonly used in United Kingdom (Lui et al., 2009). Following the WHO age-friendly movement in 2006, the term "age-friendliness" becomes the universal term referring to similar ideas mentioned above. In this chapter, I shall look into the concept of age-friendliness, explain in greater details the WHO Age-friendly framework. Given the large body of work on age-friendly cities and communities (AFCC) literature, this chapter will first give an overview of existing literature, before highlighting studies that specifically address age-friendly policy implementation and development and comparative studies, which are both of great relevance to this research. In addition to this, this chapter will also discuss the theoretical framework adopted in understanding age-friendliness in Manchester and Hong Kong, through the lens of neo-institutionalism and street-level bureaucracy.

2.2 WHO Age-friendly Framework and Development

The idea of "age-friendliness" builds on WHO's active ageing framework and it will be one of the key foci of this research. According to WHO, an age-friendly city is where *"policies, services and structures related to the physical and social environment are designed to support and enable older people to 'age actively' – that is, to live in security, enjoy good health and continue to participate fully in society"* (World Health Organization, 2018b). There are several models of age-friendliness, such as the WHO model, AdvantAge Initiative, Manchester Ageing Strategy, and Conceptual Process framework and Social Connectivity framework (McGarry & Morris, 2011; Steels, 2015). This research focuses on the WHO model, which is the most popular and most

widely adopted model around the world (Plouffe et al., 2016; Rémillard-Boilard, 2018). Throughout the years, WHO has been working progressively towards building age-friendly environment.

In 2007, the WHO Global Age-friendly Cities: A Guide was published in providing a comprehensive framework in building an age-friendly society. This guide was developed based on data collected from 33 cities around the world, through focus groups and interviews with older people, caregivers and service providers. It points towards a bottom-up approach in addressing age-friendly planning, which suggests participation of older people in the policymaking as well as monitoring processes. However, in later publications, WHO did revise the suggestion to be more of a collaborative partnership approach, meaning a "bottom-up participatory approach should be

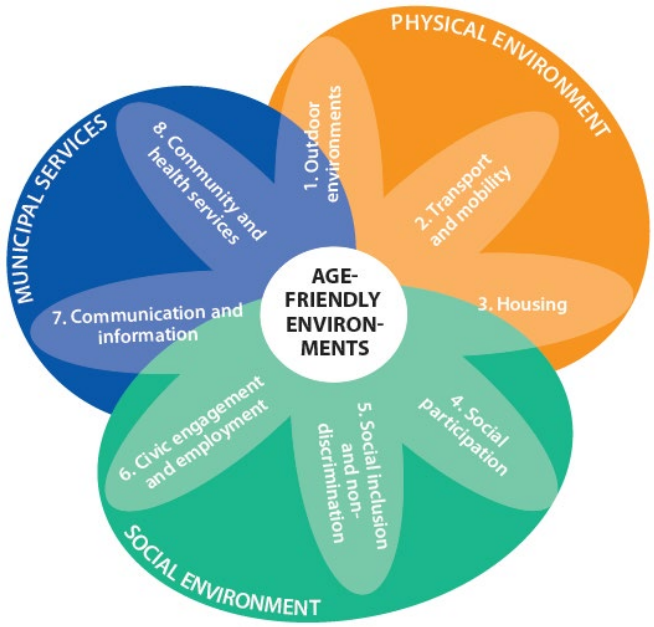

Fig. 2.1 Modified version of the WHO eight domains (Jackisch et al., 2015; WHO, 2018a)

combined with top-down political commitment and resources" (World Health Organization, 2019). This approach provides a lens of both "top-down and bottom-up" in looking at age-friendly policy implementation and development, which I will go back to in the later section of this chapter. In the age-friendly guide, eight domains were identified as determinants of age-friendliness (World Health Organization, 2007b), and was later modified to group the eight domains into three clusters, namely physical environment, social environment and municipal services as shown in Fig 2.1.The purpose of this guide is to allow cities to look into ageing policies from the perspectives of older people, in order to improve the overall age-friendliness of the environment they live in. This guide serves as a "universal standard for an age-friendly city" (WHO, 2007). Rather than using this guide to rank a city's age-friendliness, it serves more as a self-assessment tool for cities to monitor their progress. This guide should also be seen as a starting point rather than an end, with the

anticipation of having more research studies on age-friendliness to be done in the future, so as to give an update on the progress and give suggestions.

In addition to the guide published in 2007, the Global Network for Age-friendly Cities and Communities (GNAFCC) was established in 2010, aiming at connecting cities around the globe to work together towards this goal of achieving age-friendliness in communities. Up to 2021, there are already over 1,333 members (including cities and communities) across 47 countries (WHO 2021). In 2015, the WHO took a step further, and published another document entitled "Measuring the Age-friendliness of cities". In response to the previously published guide, this guide provides "a framework and a set of core and supplementary indicators to inform the selection of a local indicator set to monitor and evaluate progress in improving the age-

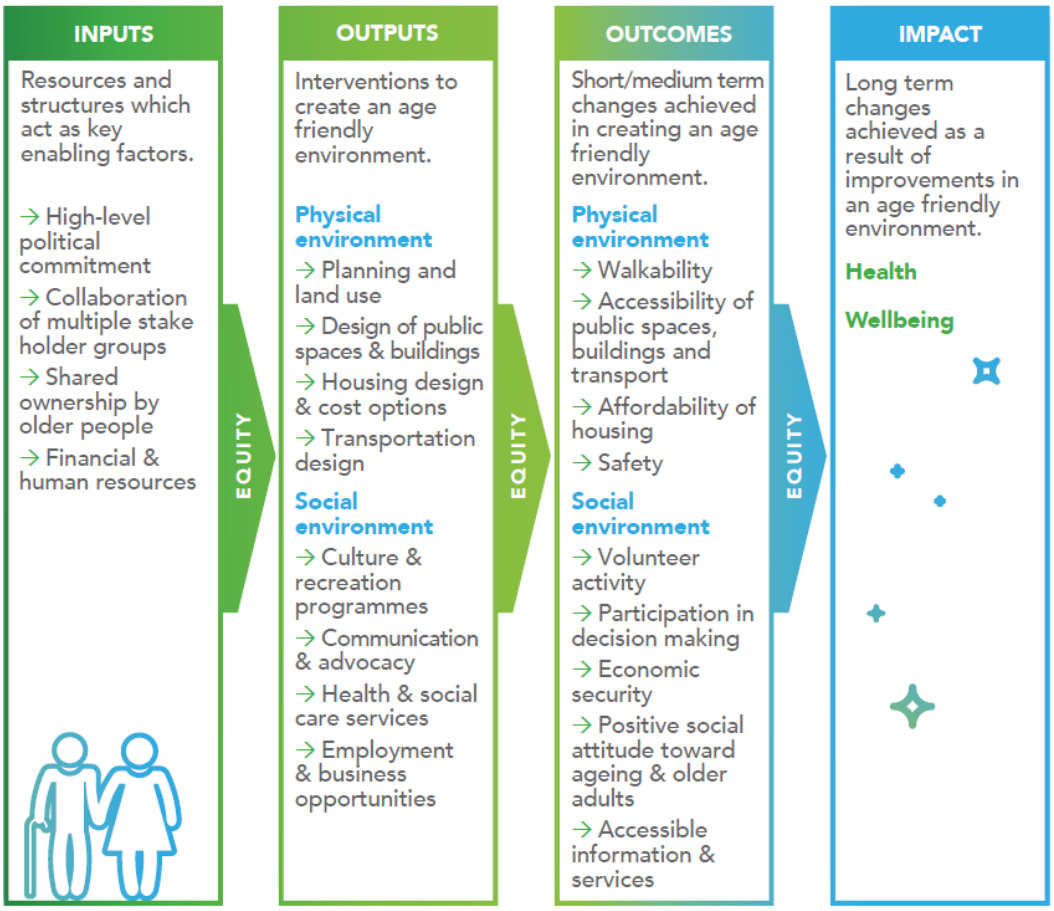

Fig. 2.2 A Framework for Selecting an Age-Friendly City Indicator Set (WHO, 2015)

friendliness of urban environments" (WHO, 2015). Under this measurement framework, there are five indicators – equity, input, output, outcome and impact, as shown in Fig. 2.2. In the years follow, there are more updates on measuring and assessing age-friendliness and a guide on membership of the GNAFCC, such as the measurement guide particularly designed for Europe was published in 2018, and an update on the GNAFCC membership in 2021 (WHO, 2018a, 2021).

To sum up, the WHO model is a comprehensive framework of creating age-friendly environment, covering as many aspects in life of older people as possible, providing a useful guide for policymakers to implement age-friendly measures at the community level, as well as a platform for communities across the globe to work together. However, despite the comprehensiveness of this model, it does have some limitations. Contextual factors such as culture can be important determinants of achieving age-friendliness in specific contexts, but these have been largely ignored in the guide (World Health Organization, 2007b, 2015). Even though the measuring framework published in 2015 is a complimentary guide on measuring age-friendliness, the core indicator set is not strictly standardized, and measurements may vary due to context-dependent nature of the phenomenon (World Health Organization, 2015). The quantitative approach in assessing age-friendliness may not be able to provide an accurate picture of the reality. For instance, the availability of social facilities may not result in a higher social connectivity among older adults. It largely depends on whether older adults find these facilities useful and are willing to engage, which cannot be accurately reflected in statistics. The WHO is aware of this limitation and has been suggesting a strong bottom-up approach in age-friendliness, even though there is a very small body of literature presenting how cities and communities practice it on the ground.

As the WHO launched the age-friendly movement in 2006, the WHO framework (eight domains) has been widely used in approaching their age-friendly research (Examples see: Black & Oh, 2022; Cao et al., 2020; DeLaTorre & Neal, 2017; Khoddam et al., 2020; McDonald et al., 2021; Plouffe et al., 2016; Ronzi et al., 2020; van Hoof et al., 2018, 2021), including critique of the framework, assessment and measurement, its conceptual development, etc. It becomes an international standard, but at the same time incorporating some “glocalization” elements in the local context (Sun, 2017). However, rarely do these studies mention what the specific local elements are that determine the level of adoption and adaptation of the WHO framework in different contexts. This is one of the gaps that this study hopes to fill in, providing more details on how and why certain places adopt the WHO framework differently from others, particularly on the neighbourhood scale.

2.3 General overview of AFCC studies

There are four general research themes identified around existing age-friendly literature, namely 1) conceptualization, 2) implementation and development, 3) assessment and measurement, and 4) challenges and opportunities (Torku et al., 2021). These themes are overlapping with each other across various studies depending on the different approaches used in

understanding age-friendliness and age-friendly policy. This study shall focus on mainly the two themes of conceptualization and implementation and development, as the research is looking into how age-friendliness is being enacted and governed at the neighbourhood level.

Age-friendly cities and communities (AFCC) research on *conceptualization* mainly focuses on conceptual framing of AFCC, in other words, the lens in which to approach AFCC. There are various concepts emerging along with and out of age-friendliness discussion, in close relation to AFCC policymaking and implementation, e.g., the WHO age-friendly model, the AdvantAge Model, the lifetime neighbourhood model, etc. (Torku et al., 2021). *Implementation and development* refers to the approach in how AFCC can be materialized at different levels of governance. There are also a number of crosscutting themes and approaches around implementation and development, such as co-production/co-creation (Buffel, 2019; Doran & Buffel, 2018; Rémillard-Boilard et al., 2017; Zuniga et al., 2021), collaborative partnership (Atkins, 2020; Black & Oh, 2022; Buffel & Phillipson, 2018; DeLaTorre & Neal, 2017; Garon et al., 2014; McGarry & Morris, 2011; Rémillard-Boilard et al., 2021; Russell et al., 2019; Steels, 2015; Xiang et al., 2021), and empowerment (Buffel, 2018, 2019; Greenfield et al., 2013; Parekh et al., 2018). These will be elaborated further in the following sections. As the AFCC policy is being implemented worldwide, there is a wide range of literature focusing on *measurement and assessment* of age-friendliness and evaluating the AFCC policy, and assessing age-friendly environment under objective assessment frameworks (Hanson & Emlet, 2006; Zhang et al., 2021) such as the WHO assessment framework in 2015 (World Health Organization, 2015), the Vancouver Protocol (Plouffe et al., 2016) and the Community Assessment Survey for Older Adults (CASOA) developed in the United States (Dellamora et al., 2015), as well as subjective assessments of age-friendliness through obtaining the views from various stakeholders (Amoah et al., 2021; Choi et al., 2020; Han et al., 2021; V. H. Menec et al., 2016; Park & Lee, 2017; Y. Sun et al., 2018; Tiraphat et al., 2020), all with the aim of exploring the best assessment practices. Among these the majority focus on examining older people's perception towards age-friendliness, such as measuring their life satisfaction (Xie, 2018) and their self-rated health (Yu et al., 2018). There are a few assessing age-friendliness using objective tools, such as the American Association of Retired Persons (AARP) Model (Sterns et al., 2020), and evaluating an advocacy program in San Diego, USA using validated MAPS-Mini audit tool (Patch et al., 2021). Only a few attempted to cover the views of multiple stakeholders. One of the most prominent examples is the study by Menec, Newall & Nowicki (2016), which measured both the objective assessment of age-friendliness of the municipal officials and the subjective assessment of age-friendliness of rural communities in Manitoba, Canada, using two different sets

of surveys. They found out there was a discrepancy between the score given by the two groups, as officials tended to slightly overestimate communities' age-friendliness. Although there is limitation of this study regarding the difference in the two surveys targeting the two different groups, it was among the first to address the possible differences in perception of AFCC from different stakeholders, which might lead to very different interpretation and process of creating age-friendly communities. The last theme, *challenges and opportunities*, refers to studies on the contextual factors such as political, social, economic, or environmental, that hinder or promote the AFCC development, such as economic austerity, social exclusion, bureaucratic rules, political commitment, etc (Buffel et al., 2012; Buffel & Phillipson, 2018; Fitzgerald & Caro, 2014; McGarry & Morris, 2011; Novek & Menec, 2014; Rémillard-Boilard et al., 2017; Walker, 2016).

Regarding age-friendly research locality, a significant number of AFCC studies were carried out in North America where the idea of age-friendliness/elder-friendliness was originated from, followed by the United Kingdom and Hong Kong (Torku et al., 2021). There is an also increasing number of studies done in Europe, including Switzerland, Belgium and the Netherlands, as well as in Asia, such as Taiwan, Japan and Southeast Asian countries, and also Australia and New Zealand (Torku et al., 2021). The United Kingdom and Hong Kong have been prolific in the age-friendly research. In Hong Kong, most studies started emerging after the Jockey Club launched the Jockey Club Age-friendly City Project (JCAFC) in 2015. The majority of these studies are attempting to measure older people's perceived age-friendliness at the district level, all of which adopting the WHO domains in the measurement (Amoah et al., 2021; A. M. L. Au et al., 2017; A. C.-M. Chan & Cao, 2015; Chui et al., 2020; Y. Sun et al., 2017; M. Wong et al., 2015). There is one study done by Phillips, et al. (2018) that gave a comprehensive review of the age-friendly (-related) policy development in Hong Kong. Due to the absence of a clear age-friendly strategy, Phillips, et al. (2018) looked into age-friendly-related measures including "ageing in place", community projects, housing policy, research, etc. They found out that there is a lack of understanding of age-friendliness among the wider population. They particularly highlighted the existence of the gap between "official optimism and promulgations [in official policy discourse]… and the reality of age-friendliness at a local level" (Phillips et al., 2018). The concluding remark stated the importance of a collaborative partnership and the change of the ageist attitudes of the public besides improving the legal and administrative framework of the city governance. In the United Kingdom, the majority of studies are around Age-friendly Manchester following the Old Moat project done in 2012. White & Hammond (2018) who were part of the Old Moat project, wrote a book chapter on the project, explaining how to create age-friendly community through elderly participation, using

expertise from community development, urban design, gerontology, sociology and architecture (White & Hammond, 2018). This is an action research project that involved older people in creating the age-friendly neighbourhood of Old Moat. This Old Moat model provided an important prototype for other neighbourhoods in Manchester to follow.

Moreover, the majority of the studies contribute to the implementation and materialization of age-friendliness at the regional or community level, through case studies of particular cities or regions. For example, in the early 2010s, a significant number of studies focus on understanding age-friendly community initiatives (AFCIs) in the North America (Greenfield et al., 2015; Greenfield, 2018; V. H. Menec et al., 2021), such as the AdvantAge Initiative in the US (Hanson & Emlet, 2006), Age-friendly Portland (Neal et al., 2014), Age-friendly Community in Quebec (Garon et al., 2014; Moulaert & Garon, 2015), and Europe, such as Age-friendly Manchester (Buffel et al., 2014; McGarry & Morris, 2011). These initiatives can be both voluntary neighbourhood groups, and government-led organizations. There are also studies which concern about the sustainability of AFCIs (Han et al., 2021; V. H. Menec et al., 2021; Russell et al., 2019). As this research is interested in looking at how the process of age-friendliness is being played out in two different places, the following shall focus on conceptualization and implementation and development.

2.4 Conceptualization of AFCC

In the latest systematic review done by Torku, et al. (2021), they identified two types of conceptual framing: “policy-inspired framing” and “scientifically inspired framing”. “Policy-inspired framing” is believed to lay a foundation for supporting age-friendly policies at different levels of governance. The WHO model, the Elder-friendly Community, livable community, lifetime neighbourhood and the AdvantAge Model are among the examples of “policy-inspired framing”, which provide an overarching framework for developing age-friendliness on both national policy formulation and regional policy implementation. Since the WHO framework is among the most commonly used framework, it is worth examining why and how places adopt the WHO framework and the applications. In this regard, a lot of studies focus on the conceptual framing of age-friendly policy on the national/regional/city level, spreading across different levels of governance, but much less on the neighbourhood level. There are three particular studies that tried to look into age-friendliness from older people’s perspectives (Domínguez-Párraga, 2019; Garner & Holland, 2020; Mahmood et al., 2012). Mahmood et. al. (2012) and Domínguez-Párraga (2019) both looked into how older people understand their own neighbourhoods through qualitative means namely photovoice and in-depth interview respectively. Garner & Holland (2020) measured the subjective

age-friendliness from older people through quantitative longitudinal study, based on Age-friendly Environment Assessment Tool (AFEAT). The AFEAT is a 10-item measure converted from the WHO 8 domains, which will calculate a "frailty profile score", based on assessments of functional limitation profile, quality of life and loneliness (Garner & Holland, 2020). Yet all three studies only look at the perception of older people which ignores the complexity of the age-friendly development process at the neighbourhood level, i.e., how older people interact with other stakeholders in the community and what other contextual factors are at play that shape older people's experience of age-friendliness. This bit of details and nuance about the age-friendly development in the neighbourhood is yet to be captured. Also, given the complexity of the interaction between national-level and community-level age-friendly development, "[m]ore research is needed on how different entities – local, state-regional, and national policy and political action groups, the non-profit-volunteer and the private sector – can support communities to create AFCC" (Torku et al., 2021). This research aims to fill in this gap by providing a more nuanced analysis on what is happening on neighbourhood level, and its relation to the overall age-friendly strategy and vision laid out on a wider scale, i.e. regional/city level.

In contrast, "scientifically inspired framing" refers to broad theories that "conceptualize the policy-inspired frameworks as AFCC initiatives" (Torku et al., 2021). Among the many theories used in understanding age-friendly policies, the ecological/person-environment fit theory (Lawton & Nahemow, 1973) is the most widely adopted theory in age-friendly studies (DeLaTorre & Neal, 2017; Novek & Menec, 2014; Park & Lee, 2017; Y. Sun et al., 2018). The ecological model is commonly used in gerontology, addressing the relationship between older people and the environment. The *person* dimension in the person-environment fit refers to an individual's competence, which covers physical health, motor skills, and sensory capacity (Lawton, 1982; Park & Lee, 2017; Y. Sun et al., 2018). The *environment* dimension refers to not just physical but also social, cultural and even policy environments (DeLaTorre & Neal, 2017; Park & Lee, 2017). This theory is used in addressing how the environment affects older people physical and mental well-being, hence justifying the importance of examining different aspects of the environment and how it affects older people's health and quality of life (DeLaTorre & Neal, 2017; Novek & Menec, 2014; Park & Lee, 2017; Y. Sun et al., 2018). The ecological model tries to understand age-friendliness from the perspective of how the environment affects older people's wellbeing but omits the relationship between different stakeholders in shaping the age-friendly development, nor how the processes at different levels may affect each other. Here, the neo-institutionalist lens is proposed in this study to explore further on this. Neo-institutionalism understands policy implementation

process through studying institutions, the actors involved within the institutions and their behaviours. Using the neo-institutionalist perspective, this study is looking into how the different levels of governance interpret and put age-friendliness into practice, particularly focusing on the important role of street-level bureaucrats, and how such process shapes the age-friendly development in Manchester and Hong Kong.

2.5 AFCC implementation and development

a. Top-down and Bottom-up

Among traditional policy implementation study are the two major schools, the top-down and bottom-up approaches (Matland, 1995), emerging more or less around the same period, from late 1970s to throughout the 1980s. Matland and a few other scholars suggested a combined approach (both top-down and bottom-up) in understanding how policies are implemented (Matland, 1995; Sabatier, 1986, 1988, 1991; Sabatier & Pelkey, 1987). Borrowing from these approaches in studying policy implementation into understanding AFCC literature, top-down and bottom-up approaches are referred here as the two length scales looking at AFCC processes.

In understanding how age-friendly policy and the framework are being implemented and developed, there are a number of studies looking specifically into the different levels of governance (local/municipal, provincial/state and federal) (Brasher & Winterton, 2016) in implementing age-friendliness. Various age-friendly evaluative studies indicated that an effective bottom-up approach coordinated with political support from higher-level of governance is required for age-friendly policy to be successful (Brasher & Winterton, 2016). As discussed earlier, there are a number of studies examining age-friendly practices and operationalization on the community level, which either focused on measuring the subjective assessment of age-friendliness by older people (or other stakeholders, see examples from *measurement and assessment* above), or on studying the age-friendly communities initiatives (AFCI) (Greenfield et al., 2015; Greenfield, 2018; V. H. Menec et al., 2021). These studies have a rather narrow focus on either the specific actors, or specific groups involved within the communities in understanding age-friendliness, but not so much on looking into age-friendly development on community level from a more holistic perspective. In other words, there is a lack of research on an in-depth study of how age-friendliness is being played out on community level, what players are involved, what they do and how they interact, which are exactly what this study hopes to find out.

One of the early studies on both top-down and bottom-up stakeholders in age-friendliness was done in Manitoba, Canada. Menec, et. al. (2016) measured the age-friendliness through

survey collected from municipal officials, and residents of rural communities. The result showed a discrepancy between the municipality and residents, with particularly lower ratings by residents from larger communities than that by municipal officials (V. H. Menec et al., 2016). In a similar study by Lin, et al. (2019) in Taiwan, they measured the level of age-friendliness through a questionnaire collected from policy facilitators (policymakers/project leaders) and experts (scholars/architects) (Lin et al., 2019). A similar result was shown, indicating "overly optimistic" views from the facilitators, meaning a high score of age-friendliness, as compared to that of the experts. Lin, et al. (2019) explained that this might be due to the lack of thorough understanding of the concept of age-friendliness by the facilitators. In another case study of Australia, Brasher & Winterton (2016) reviewed the age-friendly process in the city of Victoria and commented that the poor leadership and lack of a clear strategy restrained the collaboration between different sectors throughout the process, and in turn limited the level of engagement among older people.

Both of the above studies showed the overly optimistic view of community age-friendliness by municipal officials/facilitators (who are defined as top-down actors in this study), and the weak leadership from the top/limited involvement from the bottom. The implications are two-fold here: first rarely are there any studies that specifically address other possible stakeholders that fall outside the top-down bottom-up dichotomy, i.e. those intermediary actors, e.g., social workers, neighbourhood workers, community organizers; secondly, it shows the gap between the top-down and bottom-up stakeholders in terms of their understanding and assessment of age-friendliness. The narrowing and bridging of this gap are very much needed, which brought to the questions of how such gaps can be narrowed and by whom. Hence this study shall look into street-level bureaucrats (SLBs), who are largely neglected in existing literature, and what they did and how they helped bridge the gap the top-down and bottom-up players.

b. Collaborative approach

Among the wide literature on age-friendly implementation and development, the majority suggested the approach of collaborative partnership as the most appropriate approach, as also stated in the WHO updated guide on measuring age-friendliness (Atkins, 2020; Black & Oh, 2022; Buffel & Phillipson, 2018; DeLaTorre & Neal, 2017; Garon et al., 2014; Goldman et al., 2016; McGarry & Morris, 2011; Rémillard-Boilard et al., 2021; Russell et al., 2019, p. 201; Steels, 2015; World Health Organization, 2015). There are various numbers of stakeholders mentioned in these studies that are suggested to be involved in the age-friendly collaborative partnership. For example, Moulaert & Garon (2015), DeLaTorre & Neal (2017), Sun, et.al. (2017) and Buffel &

Phillipson (2018) discussed the role of academic as providing evidence-based research in designing age-friendly policies. However, the question of how long and how academics should be involved in the process was barely mentioned in these studies and is yet to be explored. In particular, Buffel argued that co-production/co-creation to be an effective approach in strengthening the involvement of older people in the age-friendly process (Buffel, 2018, 2019; Buffel & Phillipson, 2018).

There are only a small number of studies examining the stakeholders of the AFCC process that provide enough details on specific stakeholders, particularly on the stakeholders who are neither top-down (policymakers, planners, local authorities) nor bottom-up (older people, local residents). Just this year, Xiang, et al. (2021) attempted to compile a comprehensive list of stakeholders at the briefing stage of promoting age-friendliness in urban China. The list is created based on existing literature that mention stakeholders in their studies, summarized in Fig. 2.3 below. From Fig. 2.3, S7 are among those in between stakeholders, which I would suggest terming them as street-level bureaucrats, and I argue are crucial in the process, but are largely underestimated in existing literature.

Code	Stakeholder	Source
S1	Senior citizens	Garon *et al.* (2014), Liddle *et al.* (2014), Chan and Cao (2015), Greenfield *et al.* (2015), Lowen *et al.* (2015), Moulaert and Garon (2015), Steels (2015), Chan *et al.* (2016), Cho and Kim (2016), Orpana *et al.* (2016), Sixsmith *et al.* (2017), Buffel and Phillipson (2018), Buffel (2019), Lin *et al.* (2019)
S2	Caregivers	Garon *et al.* (2014), Cho and Kim (2016), Sun *et al.* (2017)
S3	Local governments and policymaking institutions	Garon *et al.* (2014), Liddle *et al.* (2014), Menec *et al.* (2014), Chan and Cao (2015), Greenfield *et al.* (2015), Lowen *et al.* (2015), Moulaert and Garon (2015); Spina and Menec (2015), Steels (2015), Chan *et al.* (2016), Cho and Kim (2016), Orpana *et al.* (2016), Gudowsky *et al.* (2017), Sun *et al.* (2017), Greenfield (2018), Lin *et al.* (2019)
S4	Research institutions	Glicksman *et al.* (2014), Chan and Cao (2015), Moulaert and Garon (2015), Cho and Kim (2016), Orpana *et al.* (2016), Sun *et al.* (2017), Liddle *et al.* (2014), Neal *et al.* (2014), Lin *et al.* (2019)
S5	Project investors and real estate developers	Garon *et al.* (2014), Chan and Cao (2015), Greenfield *et al.* (2015)
S6	Urban planners, architects and interior designers	Cho and Kim (2016), Arentshorst and Peine (2018)
S7	NGOs	Garon *et al.* (2014), Menec *et al.* (2014), Chan and Cao (2015), Greenfield *et al.* (2015), Moulaert and Garon (2015), Steels (2015), Chan *et al.* (2016), Cho and Kim (2016), Orpana *et al.* (2016), Sixsmith *et al.* (2017), Sun *et al.* (2017), Greenfield (2018)

Fig. 2.3 Key stakeholders included in AFCs projects (Xiang, et. al., 2021)

Hence, if collaborative partnership is the most effective approach, then what kind or what form of collaboration and partnership? How to strengthen the relationship between these stakeholders? These are questions that are currently absent in existing literature and yet to be answered. As suggested by Torku, et.al. (2021) in their latest systematic review, *"[m]ore*

fundamental research is required to understand how to successfully run a whole community AFCC approach inclusive of the various entities (especially the non-governmental entities) with respect to all the domains of AFCC".

2.6 Comparative study on AFCC

In understanding how age-friendly process is being played out in different places around the world, comparative study on age-friendliness shall be able to provide details on the similarities and differences of different age-friendly practices and processes globally. Before 2017, cross-national comparison was rare, with one comparing the age-friendly policies in Brussels, Belgium and Manchester, UK in 2014 (Buffel et al., 2014) and another one comparing the Age-friendly cities models in Quebec, Canada and Wallonia, Belgium in 2015 (Moulaert & Garon, 2015). Both studies examined age-friendly processes in western contexts. In Buffel, et. al. (2014) study, even though Brussels and Manchester are more or less on the same page in terms of their own age-friendly development, their approaches appeared to be quite different. This study found out that the notion of age-friendliness was not as "on the ground" in Brussels as in Manchester, because in Brussels, age-friendliness was more about getting the accreditation from the WHO Global Network of Age-friendly Cities and Communities which involved mostly city councilors and their cabinets, rather than actively engaging older people in the community; whereas in Manchester, "Age-friendly Manchester" is a widely promoted key project in Manchester city strategy, so age-friendliness is quite well promoted among the older population. The other comparative study between Canada and Belgium looked into how the Walloon region in Belgium and Quebec province in Canada carry out their age-friendly policy. The results show significant differences between the two cases. The Walloon AFC program was not a very well-planned one, with the WHO framework mentioned in the plan but was never seriously applied in the program, research element being totally absent at the start of the program, and little actual involvement of older people. In contrast, the AFC program in Quebec was very well-developed with a clearly stated three-step process for cities to follow, and very strong research element and social participation. The distinctive contrast between the two cases in terms of the research component made the authors ponder on the role researchers played in the process. The authors concluded by encouraging an open dialogue between researchers and older people, government officials and policymakers (Moulaert & Garon, 2015). In addition to the above two comparative studies, there is another qualitative study comparing the physical activities of older people in eight neighbourhoods in Canada and the United States using photovoice

(Mahmood et al., 2012). Despite the fact that the sample spreads across eight neighbourhoods in two countries, the findings identified significant similarities, including the facilitators of physical activity such as presence of "flat, smooth walkways or sidewalks, aesthetically pleasing environments or presence of benches, handrails and ramps", and the importance of a social component associating with physical activity (Mahmood et al., 2012).

From 2017 onwards, more cross-national comparison was done, particularly in Asia. One example is the comparative study on age-friendly strategy between the city of Chayi, Taiwan and Hong Kong (Y. Sun et al., 2017). This study was an in-depth examination of the process of glocalization of AFC in Taiwan and Hong Kong. The result identified two different forms of local governance in Chayi and Hong Kong: an institutionalized form of governance in Chayi, with more "hierarchical coordination between levels of government in; and a grassroot type of local governance in relation to AFC practices in Hong Kong". Another important finding of this study was the strong academic association in promoting AFC in both places, yet their influence on AFC policy decisions largely depends on the commitment of the local authorities (Sun, et. al., 2017). The other example is the cross-national comparison of age-friendliness measurement and the impact of age-friendliness in Thailand, Malaysia, Vietnam, Myanmar and Japan (Tiraphat et al., 2020). This is a cross-sectional quantitative study with a sample size of over 2000 older adults aged 55 and over in the capitals of the 5 countries stated above. The research findings indicated five aspects that are inadequate in an age-friendly environment: 1) enrollment in formal or informal education; 2) employment opportunities; 3) the availability of home care service by public/private care services; 4) participation in training that addresses the needs of older people; and 5) engagement in decision-making in community affairs. These findings hoped to shed lights on how policymakers can improve their services in better catering older people's needs (Tiraphat et al., 2020). In Europe, van Hoof, et al. (2018) did a comparison between Poland and the Netherlands, focusing on identifying the challenges of urban ageing, based on the WHO 8 domains. Van Hoof, et. al. (2018) identified from the case studies that the challenges the two cities of Hague and Kraków are facing mainly surrounds the domains of social participation, and respect and social inclusion. One similarity found is the shift in perception towards the use of technology as a form of social engagement (van Hoof et al., 2018).

Among existing literature, relatively less scholarly attention was given to cross-cultural study on age-friendliness in the field. The most relevant cross-cultural study was done on attitudes towards ageing, in which Chang, Chang & Shen (1984) compared the views of Chinese in Taiwan and in the US. The study shows how the environmental factors such as socio-economic background, and urbanization may lead to different views towards ageing among the same ethnic group, in this case,

Chinese. As the findings show, in western countries, ageing is generally viewed negative, while in Chinese society, old age signifies a form of authority, respect and prestige (Chang et al., 1984). It further stated how Confucianism might have an effect on the view towards ageing. Nevertheless, the study was done in over 30 years, the data might be outdated and less reliable. But it does shed lights on the possible cultural differences in views towards ageing. Such difference might be reflected in the views towards age-friendly measures among older people in Asian and western contexts. The strong influence of Confucianism on Chinese culture can have a significant impact on how a western model (WHO model) can be successfully implemented in a non-western context. Hence, the cross-cultural perspective should be taken into consideration in studying age-friendly policy transfer in western and non-western contexts. In a recent systematic review on age-friendliness, Torku, et al. (2021), suggested that ""[t]hese crossnation comparisons are essential to providing answers to existing and future critics".

From all the above examples of comparative studies, we can draw on an important insight. Regardless of the nature of comparison (cross-cultural or cross-national), there are a wide range of topics each comparison looks into regarding age-friendly development. Hence it might not be as important as what exactly each study focuses on, but rather what implications the findings bring about. Borrowing the idea from comparative urbanism, in which Robinson suggested two comparative strategies: "genetic" which stresses on interconnections, and "generative" on variation-finding based on shared features (to be discussed in further details in Chapter 3) (Robinson, 2016). This study seeks to compare Manchester and Hong Kong using "generative" comparative strategy, with "age-friendliness" being the common feature and identify how the two places with different forms of governance, socio-economic conditions, cultures, different dynamics and interactions between actors, etc, develop its own unique form of age-friendly communities. This is believed to be one of the very first truly international comparisons on age-friendly processes.

2.7 Theoretical framework: Neo-institutionalism and Street-level Bureaucracy

2.7.1 Neo-institutionalism

Neo-institutionalism is a methodological approach across various disciplines in social sciences, including political science, psychology, economics, and sociology. Particularly in political science, where neo-institutionalism was originated from, the study of institutions had been there during the 1930s to 1950s, when institutionalist approach focused on formal rules and structures within political and governmental institutions (Ishiyama & Breuning, 2014). But the old institutionalism was criticized as being too descriptive in nature, and as being normative in terms of understanding institutions as what they ought to be like or function, rather than studying empirically how institutions work in reality (Hall & Taylor, 1996; Ishiyama & Breuning, 2014; March & Olsen, 1983). In the next two decades that followed, the interest on studying institutions faded when political scientists were more interested in understanding actions and behaviours of political actors. This is what was called the “behaviouralist approach". It was not until the mid-1980s that the traditional institutionalism was regaining more attention from behaviouralists. There emerged the neo-institutionalism, in which behaviouralists ideas were somewhat embedded in traditional institutionalism. In other words, the study of institutions had since then been brought back into the scene, adding in new lens of looking into choice of individuals developed from behaviouralists (Ishiyama & Breuning, 2014).

What makes the “new” different from the “old” institutionalism is not so much about the differences, but rather how the “old” transformed into the “new”. Neo-institutionalism broadened the definition of the term “institutions”, from what was previously understood as strictly “institutions within organizations” into including other forms such as formal/informal rules, shared social/cultural norms and understandings, as well as “standard operating practices” (DiMaggio & Powell, 1991; Selznick, 1996; Sorensen, 2017). This new form of institutionalism does not limit to just one single analytical approach, Hall and Taylor (1996) discussed the three major schools of thought: rational choice institutionalism (RI), historical institutionalism (HI) and sociological institutionalism (SI). These three approaches share the same belief – the belief that the role of institutions should be taken into account in order to explain the social world, and the choices of different actors, through understanding the relationship between agency and structure, how behaviours are shaped by institutions, and how institutional changes occur (Alasuutari, 2015; Sorensen, 2017). But each of them has a different approach to these questions, particularly in defining the relationship between behaviour and institutions, and explaining the changes within/origins of institutions (Alasuutari, 2015). RI is a methodological approach that focuses on

individual choices, and the aggregation of which constitutes collective behaviour. RI believes individuals choices are pretty much governed by institutional constraints (Pollack, 2003). RI studies institutions using a set of approaches surrounding three areas of inquiry: "the effects of institutions; why institutions are necessary at all; and the endogenous choice of particular institutions, including their long-term durability and survival" (Weingast, 1993). HI provides a "power-political" approach in the study of institutional change, formation and continuity. Its major contribution is the concept of "path dependence, meaning "history matters" or how later events are influenced by earlier ones (Sorensen, 2017). In other words, how contemporary decisions and behaviours can be explained by a tight-knitted network of historical traces and events. SI understands institutions as not just created and maintained by formal rules, but also a set of actions and meanings based on social and cultural norms and conventions (Sorensen, 2017). Apart from the above three types of neo-institutionalism, there is also the "fourth" one named discursive institutionalism (DI), a term dubbed by Schmidt in 2008. Schmidt (2008) pointed out that the key problem of RI, HI, and SI is the "subordination of agency (action) to structure (rules), based on the assumption that everyone follows the (formal and informal) rules once they've been established (Schmidt, 2008). This is where DI comes in, arguing that institutions are both "given and contingent" – given in the sense that agents act within a "given" institutionalist context, but contingent in relation to actions of the agents (Wahlström & Sundberg, 2018): 'These institutions are therefore internal to the actors, serving both as structures that constrain actors and as constructs created and changed by those actors' (Schmidt, 2008, p. 314). My study will be using the lens of both sociological institutionalism and discursive institutionalism in approaching the research questions. More details on SI and DI will be discussed further below.

a. Sociological Institutionalism

Sociological institutionalism was developed in political science in the 1970s, in providing an updated sociological perspective in the field of organizational theory. This lens helps to make sense of the social world with a modern form of bureaucracy and organization which is shaped by 'a diverse set of practices associated with "culture"' (Hall & Taylor, 1996). At the time, when many sociologists believe that organizations operate on inherent rationality as suggested by RI, sociological institutionalists challenged this by arguing that many forms and procedures in organizations are in fact "culturally specific practices" that are assimilated into organizations. Even the most bureaucratic practices need to be explained in cultural terms (Hall & Taylor, 1996). In this sense, institutions shifted gradually in accordance with the cultural and symbol systems slowly

evolving over time. With that said, sociological institutionalists are interested in understanding why organizations take on particular sets of institutional procedures, forms and symbols, and how these practices are spread across different organizational fields or even countries (Hall & Taylor, 1996).

There are three distinctive features that differ SI from RI and HI under the neo-institutionalism branch, one concerning the definition of institutions and the other two the relationship between institutions and individual actions. First, sociological institutionalists define institutions in a much broader dimension, blurring the conceptual divide between "culture" and "institutions". They see institutions not only limited to formal procedures, norms and rules, but also moral templates, cognitive scripts and symbol systems that provide "the frames of meaning" which guides human action (Hall & Taylor, 1996). There are two implications to this assumption: it challenges the distinction between "cultural explanations" and "political explanations" as used by many political scientists; secondly, it somehow defines "culture" itself as "institutions" (Hall & Taylor, 1996).

The second feature concerns the relationship between institutions and individual actions. Sociological institutionalists adopted the social constructivist perspective into the traditional line of the "normative dimension of institutional impact", meaning that behaviours and actions are influenced by institutions when individuals associate institutions with "roles" to which "norms" are attached. SI modified this argument, elaborating on the influence of behaviours not simply by "specifying what one should do but also by specifying what one can imagine oneself doing in a given context" (Hall & Taylor, 1996). In other words, individuals are aware of the appropriate behaviours attached to particular roles they identify themselves in in specific contexts, according to the cultural norms and symbol systems attached to these roles.

Thirdly, sociological institutionalists seek to explain the origin and change of institutional practices. In contrast to RI which explains how the development of institution depends on efficiency, sociological institutionalists argue that organizations might tolerate specific practices and actions even some of them are "dysfunctional" in RI's terms of means-ends efficiency, simply because they value "logic of social appropriateness" over "logic of instrumentality" (Campbell, 1998; Hall & Taylor, 1996).

These distinctive features of SI offer to present a more realistic side of what exactly actions and decisions made within organizations are based on, which tend to be "social appropriateness" over efficiency. This might possibly explain the (in)efficiency in social and political institutions (Hall

& Taylor, 1996). Unlike HI that emphasizes on path dependence policy choices and national differences, SI suggests "global isomorphism". Contrasting with RI, SI believes that actors rather than being constrained, are actually constituted by institutions, and their interests emerge within different historical and normative contexts (Alasuutari, 2015). This type of lens is useful in understanding the age-friendly development in both Manchester and Hong Kong, particularly in how actors make certain decisions and take certain actions within the institution, and what outcome this would lead to.

b. Discursive Institutionalism

As discussed briefly above, discursive institutionalism (DI) challenges the notion of the three neo-institutionalisms that institutions are static in relation to actors, and that actors only act within the constraints and boundary of the institutions. Instead, DI argues that institutions affect actors' choices and actions, but simultaneously, institutions are being transformed by certain behaviours of the actors. In particular, local actors adapt and adopt policy models to local conditions and also to their own interests (Alasuutari, 2015). More so, the core of DI as suggested by Schmidt is the focus on the role of ideas in influencing political action. How do people understand certain ideas? How do they interpret them and practice them? What's the difference in the interpretation and representation of the same ideas amongst different people? How does that affect political decisions and action? From this, Schmidt further suggested two basic forms of discourse: "coordinative discourse" suggesting horizontal communication among policy actors; and "communicative discourse" which suggests vertical communication between the public and political leaders (Schmidt, 2008).

As an overview, policy discourse mainly involves various policy actors such as elected officials, activists, civil servants, etc, and the two types of discourse describe the direction of communication: either among themselves, or to the general public. The definitions appear to suggest a one-way communication mainly from top down, but in reality, it can happen both ways. "Coordinative communication" involves groups and individuals seeking consensus among themselves over policy ideas in the process of policy construction. Some examples are the "advocacy networks" of human rights activists (Keck & Sikkink, 1998), "advocacy coalitions" in local water policy in California (Sabatier & Jenkins-Smith, 1993), and "discourse coalitions of "ordo liberalism" in post-war Germany (Lehmbruch, 2001). As for "communicative discourse", it consists of a number of different policy actors, not limited to political leaders, elected officials, party activists, but also community organizers, opposition parties, social activists, think-tanks and even

the general public. It can be both groups and individuals in the legalization, and (re)presentation of political ideas to the public. It can also be from bottom-up, citizens and constituents can also possibly contribute to the discourse, representation and manifestation of policy ideas (Schmidt, 2008). In short, the discourse of certain ideas by particular actors is a reflection of how certain actors understand particular policy ideas, which guides their actions and behaviours in the policy development and implementation process, and in turn shapes these processes.

2.7.2 Street-level Bureaucracy

In addition to the neo-institutionalism discussed, Lipsky's street-level bureaucracy theory comes into discussion of policy implementation. Street-level bureaucrats are defined as "public service workers who interact directly with citizens in the course of their jobs, and who have substantial discretion in the execution of their work" (Lipsky, 2010, p. 3). Lipsky coined the term street-level bureaucrats (SLB) in 1969, referring to public workers within the institutions that have direct day-to-day interactions with citizens, with specific reference to teachers, police officers, and lower court judges. The term was later on expanded to social workers, medical professionals, or even actors from private sectors (Sager et al., 2014). Lipsky argues that SLBs are powerful actors that can "make" policy, because of their very position at the lower end of the institutions and bureaucracy. They are the frontline workers that play out how policies are implemented. With that said, they have what Lipsky termed as "discretionary power" to make policy decisions based on their own interests, and the study of how such "discretion" is being played out by SLBs becomes the key in understanding the "becoming" of policies (Lipsky, 1969, 2010). In short, "autonomy" and "discretion" are the two central themes in Lipsky's theory, which argues that the discretionary power SLBs possess depends on the degree of autonomy they enjoy in order to exercise such power. Lipsky had a rather negative connotation about street-level bureaucrats and the study of SLBs is mainly from the managerial perspective, i.e., how to manage the SLBs better so that they could help with meeting organizational goals. Of course, later literature added new perspectives in understanding SLBs, which I will discuss here as well, as it is crucial to the central theme of this study.

a. Work conditions of street-level bureaucrats

There are a number of work conditions suggested by Lipsky that are salient in the working environment of SLBs, namely a) inadequate resources, b) demand & quality of services, c) ambiguity of goals, d) performance measurement & e) relationships with clients. These conditions are challenges that explain precisely why and how SLBs would execute their discretionary power

to perform their duties, in relation to the autonomy that they possibly enjoy under these conditions (Lipsky, 1969). These conditions possibly gives an account of why certain actors (particularly those actors who are in close contact with older people) in the age-friendly development behave in a certain way in relation to using their discretion throughout the case studies.

i. Inadequate resources

Lipsky identified two types of resources required for SLBs to function adequately, namely organizational resources and personal resources. One good example of organization resource is the manpower/client ratio (Lipsky, 1969). The more clients a SLB provides service to, the higher chance of increased stress level, particularly in meeting the expectation of the quality of service. Examples of personal resources required for "adequate job performance" include access to information, ample time for decision-making and insufficient training, etc. (Erasmus, n.d. Lipsky, 1969) . Lipsky gave various examples of SLBs facing the problem of resource inadequacy: lawyers who are responsible for 80-100 clients may only be able to focus on a dozen cases only; teachers in overcrowded classes are unable to give attention to each student as required by good teaching practices; social workers are not able to pay home visits due to the already backlogged paperwork, etc. (Lipsky, 2010, p. 30). The inadequacy of resources is a very common issue that SLBs have to face in delivering services hence the unique nature of SLBs allows them more autonomy in doing their job right within limited resources. This is one of the reasons that help explain why certain SLBs behave in a certain way.

ii. Demand & quality of services

The demand for (quality) services is usually related to inadequacy in resources. Lipsky argued that even with increased resources, the demand for additional service will also increase, which will add extra pressure to SLBs to provide services, and hence affects the quality of services. With that said, SLBs are almost always working under limited resources, in which quality of service would not be improved simply by allocating additional resources (Lipsky, 1969).

iii. Ambiguity of goals

As policies are being laid out usually from the higher level of governance to the bottom, the clarity of goals set from top down will also determine how developed the performance measures can be. The vaguer the goals, the more likely will street-level bureaucrats be on their own. Other than unclarity of goals, often times SLBs have to face the dilemma of

client-centred goals Vs organizational goals. When goals are not set clearly and conflict with clients' interests, SLBs would have to be the one making the decision themselves (Lipsky, 2010, p. 44).

iv. Performance measurement

Lipsky argued that goal ambiguity, which is intrinsic to SLBs, affects performance measurement. Unlike business organizations, where performances are easily evaluated through profitability, performance in social organizations are more difficult to be assessed because there is no standardized way of measuring the quality of services delivered (Lipsky, 2010, p. 50). The very nature of SLBs' complex interactions with their clients means it might not be easy or straightforward to know exactly what the right thing is to do (Erasmus, n.d.). There are way too many variables that need to be taken into consideration for evaluating SLBs' performance, which makes evaluation itself quite unrealistic. Such inability in performance measurement, Lipsky argued, gives SLBs more autonomy, hence discretionary power in doing things their own way (Lipsky, 2010, pp. 49–53).

v. Relationships with clients

The nature of the relationship between clients and SLBs are usually nonvoluntary and thus co-dependent. Clients rely on SLBs for receiving services, and SLBs rely on the clients to comply with their own expectations (Lipsky, 2010, p. 54). Individual clients might have diverse expectation towards SLBs in meeting their own needs, putting pressure on SLBs when they have to deliver services with inadequate resources as stated above. While striving to meeting clients' expectation on one side, SLBs might also face pressure from meeting goals set from higher level of the institution, alongside the desire to meet their own interests and expectations in the job. As a result, the SLBs have to face the dilemma of balancing between all these expectations, goals and decisions.

The reality about the five work conditions discussed above is that they do not occur individually, but there are always overlaps of some (if not all) of these conditions which makes the situation a bit more complex for SLBs. For example, the problem of inadequate resources is coupled with the demand for services which affects the quality of services delivered. As explained above, the quality of services would not be easily improved by simply an increase in resources, because it would only mean increase in demand for more services and high quality of services. Moreover, because of nature of SLBs being in between the service recipients and those on the higher level of administration within the organization, it is unavoidable for them to have to face the dilemma of meeting the needs and expectations of all stakeholders, from top-down to

bottom-up, and even themselves. So if the goals are not decided clearly on top, it would first make it difficult to assess SLBs' performance as it cannot be measured based on the ambiguous goals. The inability for performance check in turn confuses the SLBs in meeting any standards of service delivery because there is simply none, or it is too vague to follow. Together with the diverse demands from their clients, all the SLBs can do is to exercise their "discretionary power" to make it easier for them in terms of service delivery, meeting expectations (of either of or some of the stakeholders) and just as simple as doing their jobs.

b. Discretionary power of Street-level Bureaucrats

Discretion is central to Lipsky's theory and described as the challenge to top-down policy theorists (Gilson, 2015). The way that SLBs "make policy" makes them professionals, and professionals are thus expected to exercise "discretionary judgments" in their own fields (Gilson, 2015; Lipsky, 2010, p. 14). This also applies to those SLBs without claims to actual professional status. But Lipsky further explained that possessing discretionary power does not necessarily mean that SLBs are not restrained by regulations. Rather, not only actual rules and regulations, but also occupational, community and administrative norms are unwritten "rules" that influence and shape the policy choices of SLBs (Lipsky, 2010, p. 14). Discretion, in Lipsky's account, is a relative concept: the more discretionary power the SLBs have, the easier to study the nature of their behaviours (Lipsky, 2010, p. 15). Even though Lipsky believes that it is discretion that makes SLBs harder to manage in terms of fulfilling organizational goals, he argues that it is impossible to significantly reduce discretion for two reasons: firstly, the work conditions in which the SLBs work are too complicated to "reduce to programmatic formats"; secondly, unlike ,mundane mechanical tasks in strictly comply with operational protocols, SLBs work in the "human dimensions of situations" that require sensitive observation and judgment in responding to people usually in acute human encounters. Regarding SLBs-client relationship, discretion is in fact necessary in maintaining the legitimacy of the welfare service state (Lipsky, 2010, p. 15). All these explain why the SLBs are interesting to study in understanding policy interpretation, manifestation and implementation.

c. Beyond Lipsky: updates on SLB theory in recent years

Lipsky's account of the SLBs has been rather negative: first he identified the importance of SLBs as the policy "maker" with the assumption of the existence of the gap between "policy as written and policy as performed" (Lipsky, 2010, p. xvii), seeing them as the ones through which "[c]itizens directly experience government" (Lipsky, 2010, p. xix); then moved on to describe the nature of SLBs – that they exercise discretionary power to public service delivery; then he spent

the rest of his book explaining how to better manage SLBs, and what can be done to hold them accountable, so as to "better support a reconstituted public sector dedicated to appropriate services and respect for clients" (Lipsky, 2010, p. xix). There are two major contributions here, one is acknowledging SLBs as an important part in public service agencies, the other one is addressing SLBs as a possible barrier to achieving optimal services and policies outcomes. Decades after Lipsky's theory, there is new understanding to the concept of street-level bureaucracy, which provides a more up-to-date reflection of policy implementation in contemporary society. I shall discuss two of them in the following part, which are relevant to this study in terms of identifying the SLBs in the age-friendly development process.

i. Street-level Bureaucrats as both public and private actors

Sager, et al. (2014) expanded the discussion of SLBs not just in public service agencies, but also in the private sector. They tried to build a new SLB model in new modes of governance, in which they identified three aspects. First, they believe the boundary of defining SLBs has become blurred. In other words, with hybrid modes of governance, there emerge private actors who can also act as SLBs (Sager et al., 2014). Secondly, they looked at the different consequences caused by the different behaviours, decisions and performances by the SLBs. Third, they discussed the reasons for such differences (Sager et al., 2014). I shall focus on their first argument: private actors can be SLBs.

Traditionally, public governance is seen as "regimes of laws, rules, judicial decisions, and administrative practices that constrain, prescribe, and enable the provision of publicly supported goods and services through formal and informal relationships with third parties in the public and private sector" (Lynn Jr et al., 2001, p. 22). However, in recent decades, new modes of governance emerged as there is more collaboration between private and public sectors, implying that private actors are increasingly taking up a role in policy implementation, which transforms them into SLBs (Sager et al., 2014). With that said, Sager et. al. (2014) further argues that private actors are empowered to be more active in performing public tasks, and that the term "bureaucrat" does not narrowly refer to employment in public administration, but rather to the function of the actor as implementing agent (Sager et al., 2014). Therefore, those who are delivering public policies and services and have direct interaction with the policy recipients/beneficiaries, regardless of the type of institution and administration they belong to, are still regarded as "street-level bureaucrats".

ii. Street-level Bureaucrats as both "bad guys" and "good guys"

In responding to Lipsky's rather negative connotation of SLBs, Hill (2009) provided a more sophisticated version of the SLBs, which is summarized in the following table (see Table 2.1). Here

Hill argued that the "dichotomization" of SLBs as "good guys" and "bad guys" is intentional for easier understanding, but he stressed that the reality is more complex of a situation than just about good and bad (Hill, 2009). There are surely overlaps of the attributes in these two types of SLBs as shown in the SLBs in real life.

SLB's as 'bad guys'	SLB's as 'good guys'
People who break rules	People who adapt rules to real needs
People who disobey their superiors	People who are sensitive to the needs of the public they serve
People who use whatever discretion they have to advance their own interests	People who use whatever discretion they have to advance service ideals

Table 2.1 Negative and positive perspectives on street-level bureaucrat roles (Hill, 2009)

Even though table 2.1 hypothesized that the "bad" SLBs will break rules, in reality, the discretion in Lipsky's theories, as well as in Hill's argument, is by default behaviours that is "not preprogrammed by rules", meaning that even though discretion may often be seen as "unlimited", it is most appropriate to see "discretion as embedded in a rule structure" (Hill, 2009). This is what Dworkin described, though in colloquial terms but quite accurately, "hole in the donut" – "an area left open by a surrounding belt of restrictions" (Dworkin, 1977, p. 31). This "belt of restrictions" can be rather complex, e.g., rules conflicting with other rules, and rules that are difficult to interpret (Hill, 2009). So rather than being a real bad guy, SLBs have their own way manoeuvring around this grey area of discretion. Nevertheless, Hill's argument shed new lights on understanding SLBs as "not so bad guys" as described in Lipsky's terms. We shall find out in the case studies whether the SLBs are "good guys" or bad guys", or more of an in-between.

2.7.3 Theoretical Framework of Study

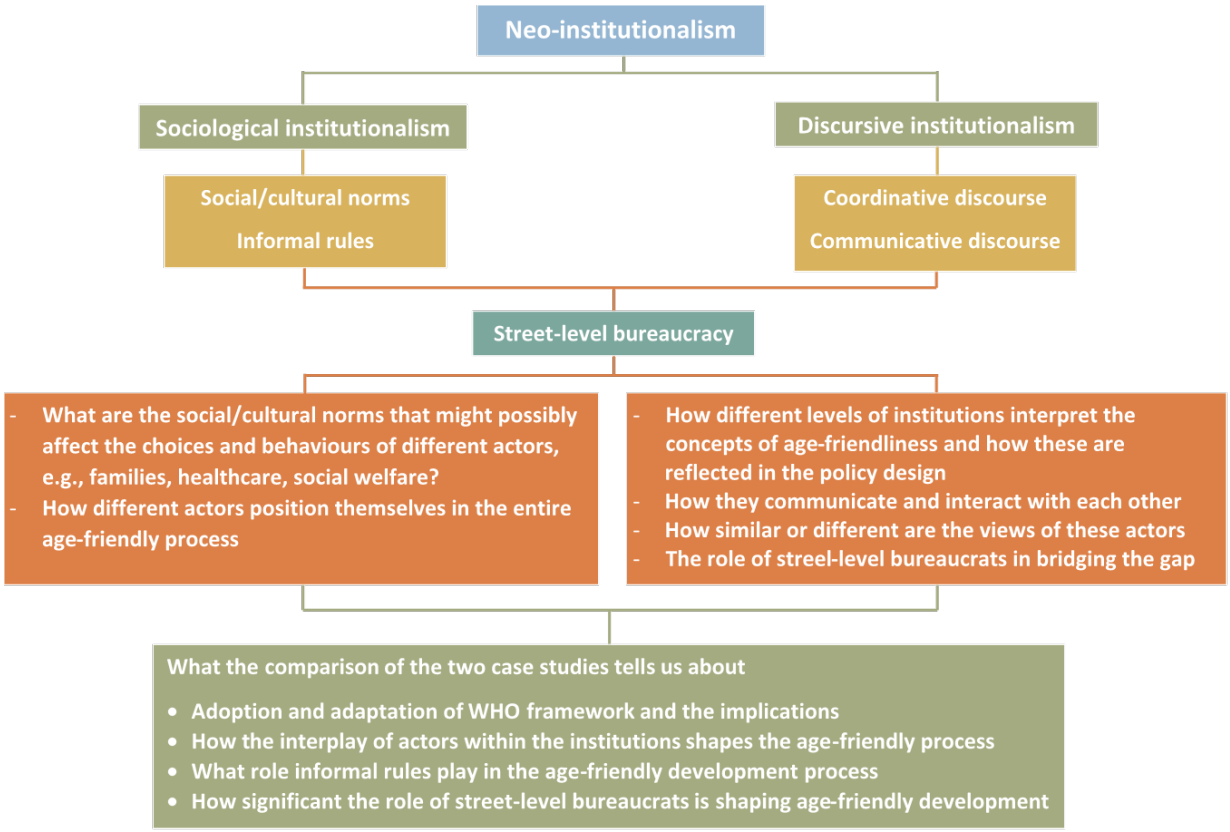

Fig. 2.4 Theoretical Framework of study

As identified above, there are relatively fewer studies looking into the actors of the age-friendly process who are outside of the top-down bottom-up rhetoric, how some of them interact with each other, and how such interaction shapes the entire age-friendly development. Through the neo-institutionalist lens, particularly the sociological and discursive institutionalist perspectives, together with the street-level bureaucracy theory, this study tries to understand the role of street-level bureaucrats in the age-friendly process, how they interpret and understand age-friendliness (including the WHO framework), and how they put their ideas into practice on the neighbourhood level. This is summarized into the diagram above (See Fig. 2.4).

As Fig. 2.4 shows, the entire study looks into age-friendly development through the neo-institutionalist lens, under which sociological and discursive institutionalist perspectives are specifically adopted. Often times, there is much more going on down at the lower level of the institution, behind the official policy agenda set from top down, and these are the actual driving forces that "make" policy. Hence, it is important to unravel this less studied part of the entire age-friendly development process. The neo-institutionalist perspective provides this angle of what exactly is happening "off stage", or "behind the scene" within the institution; in other words, a more "organic" view of understanding the age-friendly process through revealing the behaviours

and actions of different actors from bottom-up. In using the sociological institutionalist lens, the study tries to identify the informal rules and social norms that in some ways or another, constitute the actions and behaviours of different actors, particularly the street-level bureaucrats and how that shows how age-friendliness is being played out at the neighbourhood level in different contexts. On one hand, the WHO age-friendly framework and other age-friendly frameworks alike, govern the way different actors perceive and position themselves in different contexts, and this in turn shapes the process of age-friendly development. On the other hand, perhaps more importantly, the question to ask is what are the informal rules and social norms that are not visible in the official discourse of policy formation and implementation, but are there to influence the decision-making, interpretation and behaviours of the actors in relation to the age-friendly development? This aspect of age-friendliness is rarely looked into, as indicated by the literature review in the previous part, showing that the majority of studies focus on conceptualization, measurement and assessment, and implementation and development, rather than looking deeper into the details of the age-friendly development process, what actors are involved, what actors might be neglected and what role they play.

The other branch is the discursive institutionalist framework, which refers to the discussion of age-friendliness and age-friendly policy discourse. The two types of discourses, "coordinative discourse" and "communicative discourse" suggest the two directions the discourse of age-friendliness is being transferred and exchanged. This discursive framework is used in this study to identify the ways in which age-friendliness is being interpreted at different levels of the institution, how these different interpretations intertwine with each other, and how this process influence how age-friendliness is being enacted at the neighbourhood level. It is interesting to note how street-level bureaucrats, which takes up the role of a mediator, help bridging the top-down and bottom-up levels of the institution.

These two types of neo-institutionalist frameworks can be furthered with adding in the lens of Lipsky's street level bureaucracy. As explained in the literature review, there is a lack of in-depth studies looking in details into how age-friendliness is being played out on the community level. When we talk about policy implementation on lower level, street-level bureaucrats (SLBs) are undoubtedly one key player that should not be neglected, but are largely overlooked in existing literature, as stated above. SLBs have relatively more autonomy in deciding on service and policy delivery, because after all the upper level of bureaucracy depends highly on them for policy implementation and that they are the ones who are in direct contact with local residents. Their

interpretation and representation of the policy being laid down from the upper level of the institutions can be quite different and are crucial in shaping how exactly policies are carried out in reality. Studying the SLBs in the age-friendly development process will certainly add more nuance in understanding how age-friendliness is being practiced, manifested, and operationalized on the community and neighbourhood level.

My study tries to argue the crucial role of SLBs in age-friendly policymaking and development. Challenging the negative connotation of SLBs by Lipsky, my findings suggest that SLBs can bring positive impact on local policy delivery. While discretionary power – in Lipsky's terms – is more of a "loophole" for SLBs to levy on service users in order to advance their own interests; my case studies show that it is rather the existence of discretion that allow SLBs to consolidate the vague age-friendly policy ideas from higher level of bureaucracy to actual age-friendly practices that better tailor the needs of older people through extensive bottom-up efforts. In this case, the SLBs possess "good guys" qualities in Hill's account (Hill, 2009). If discretion is really the "hole in the donut", it would be interesting to learn about how the SLBs play around the existing institutional rules, informal rules and norms, policy frameworks, organizational goals, and clients' expectation. Hence the next question is what exactly are driving the SLB to behave in certain ways, how they make use of the discretionary power to meet either the policy goals, their own interests, or clients' needs, all within the "institution of age-friendly development" framework.

2.8 Conclusion

This chapter introduces the concept of age-friendliness, the types of existing age-friendly approaches, with a focus on the works done by WHO throughout the years in encouraging cities and communities around the world to create age-friendly living environment for older people. It then moves on to present a review on the global literature of age-friendliness. There are four themes identified: 1) conceptualization, 2) implementation and development, 3) assessment and measurement, and 4) challenges and opportunities. As this study aims at understanding age-friendliness at the neighbourhood scale, the focus was on the first two themes in identifying the research gaps. There are three main points concerning the literature gap identified: 1) the study of age-friendliness at the neighbourhood scale 2) the focus on the actions and behaviours of different stakeholders, and 3) international comparison. First, there is a gap on studying age-friendliness at the neighbourhood level, particularly at the level of details on the first-hand experience and accounts from individuals in the community. Secondly, some existing studies

managed to address different stakeholders in the process, but there is still a lack of understanding on their actions and their interaction with each other that has an impact on the age-friendly development in the neighbourhoods. Third, even though there is a rise of comparative study on age-friendliness, most of the comparison are of places in similar contexts, such as continental comparison within Europe and Asia, or comparison in the Global North and in western context. There is yet to be a truly international comparison of places from distinctly different contexts, such as western and non-western contexts. These are the three gaps that this research aims to fill in.

On the other hand, this study adopted a theoretical framework combining two lenses, which are the lenses of neo-institutionalism and street-level bureaucracy. In applying neo-institutionalist perspective, this study specifically focus on sociological and discursive institutionalisms, with the former emphasizing on the informal rules and normal that are usually hidden in the formal institutional system, and the latter stressing on the discourse of age-friendliness at different levels of the institution. Fusing the lens of street-level bureaucracy into these two institutionalisms, this research hopes to study specifically how the behaviours and actions of the street-level bureaucrats (SLB), in the process of age-friendly development at the neighbourhood scale, are shaped and influenced by the informal rules and norms, as well as how the role of SLBs is in navigating between the top-down and bottom-up stakeholders. The following chapter shall present the research methods based on the research questions discussed in Chapter 1, and the gaps identified and the theoretical framework discussed in this chapter.

CHAPTER 3
METHODOLOGY

3.1 Introduction

As this study attempts to explore specifically how age-friendliness is being enacted out at the neighbourhood level, qualitative case study approach is employed in the study. This chapter shall lay down the foundation of the research approach, justify and detail the research design strategy and layout. The chapter shall start by outlining the research philosophy, followed by detailing the research design including research methodology – qualitative; and research strategy: comparative case study approach. The rest of the chapter shall focus on explaining and justifying the data collection methods, including sampling method, semi-structured in-depth interview, participatory observation and exploratory investigation, and lastly the ethical consideration.

3.2 Research philosophical approach

It is believed that recognizing and understanding the theoretical assumptions and principles embedded in different disciplines is a prerequisite for researchers to ensure the validity and integrity of their research. Moon & Blackman (2014) suggested that there are three fundamental elements of research: 1) ontology, which is what exactly exists in this world in which researchers acquire knowledge about; 2) epistemology, which is about how knowledge is being created; and 3) the philosophical perspective, which is the philosophical orientation that guides a researcher's action. These fundamental elements are helpful in providing a clearer research direction, focus and design. For example, natural scientists are historically and conventionally oriented toward positivism and realism(Evely et al., 2008; Moon & Blackman, 2014). Positivism and realism point to the same belief that only one single reality is present, which can be generated from objective scientific and experimental methodology, independent of researchers' beliefs or perspectives (Crotty, 1998; Cuthbertson et al., 2020; Moon & Blackman, 2014). Whereas anthropologists, who are interested in studying the behavioural patterns and beliefs of particular cultural groups, tend to believe in bounded relativism, which holds the belief that reality is subjectively shared within particular cultural groups (Moon & Blackman, 2014). Based on this same assumption of bounded relativism, this study tries to understand the process of age-friendly development at the neighbourhood level, particularly how different actors interact with each other in the process within the community, with the belief that there are variations in the interpretations, implementations and representation of age-friendliness in different contexts,

despite adopting the same WHO age-friendly model. The following shall unpack the details of the ontological and epistemological positions, as well as the philosophical perspective underpinning this research.

3.2.1 Ontological and epistemological assumptions and philosophical perspective

On the ontological level, this research lies on *bounded relativism* along the *realism-relativism* continuum (Moon & Blackman, 2014). In other words, the research focus is based on the assumption that the "truth"/"reality" of age-friendliness is constructed subjectively, and that one single reality is shared by a certain group, which is, in this case, defined by informal rules, social and cultural norms under the neo-institutionalist lens. Narrowing the understanding of age-friendliness at neighbourhood level shall be a suitable way of achieving this goal.

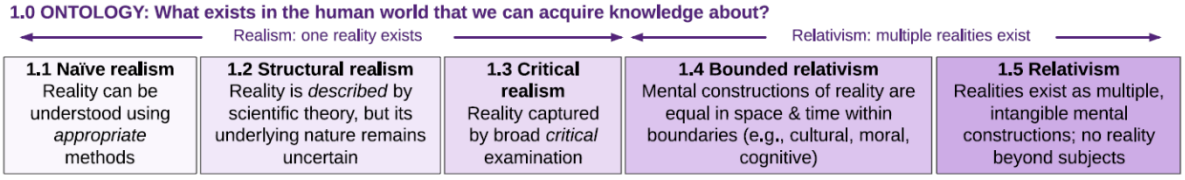

Fig. 3.1 Ontological perspectives (Moon & Blackman, 2014)

On the epistemological level, this research leans towards *constructionism* in the objectivism-subjectivism continuum (Moon & Blackman, 2014). Constructionism, as shown in Fig. 3.2, is the belief that meanings are created from the interplay between objects and subjects, in other words, it is the subjective construction of the reality of objects studied. To put this into the context of this research, the assumption is that the meaning of age-friendliness is constructed through the interplay between different stakeholders and their interaction between the physical, political, socio-cultural environment they are in. Their interpretation of the concept in turn shapes how age-friendliness is being enacted at the neighbourhood level, not necessarily seamlessly adhered to the age-friendly strategy being laid down from top down.

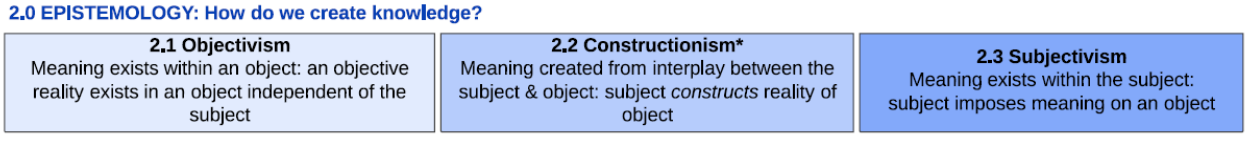

Fig. 3.2 Epistemological perspectives (Moon & Blackman, 2014)

Grounded by the above ontological and epistemological bases, the philosophical perspective adopted in this research is social constructivism, under which the meaning of age-friendliness is being shaped by groups' subjective "meaning making of reality" (Moon & Blackman,

2014). This research aims at examining the interpretation, implementation and enactment of age-friendliness at the neighbourhood scale in the two cities. It tries to argue that there is something beyond the formal rules and regulations of age-friendliness that have been laid down in the formal frameworks: these to be the subjective interpretations of age-friendliness among different actors which are guided by informal rules, social and cultural norms within the entire meaning-making system of age-friendly development, which in turn guide their actions and shape the age-friendly development in two different contexts. Therefore, relativism and constructionism are the two pillars of ontological and epistemological assumptions supporting the research objectives and shaping the research design, which will be discussed in the next section.

3.3 Research Design

3.3.1 Research type: Qualitative

To find out what the interpretations of age-friendliness are and how exactly the process of age-friendly development is, it requires a research method of both depth and breadth, a method that enables the researcher to go deeper into the issue through contextualization. In Table 3.1, Lor (2019) summarized the characteristics of quantitative and qualitative methodology in terms of their characteristics. To fulfil both the ontological and epistemological assumptions stated above, qualitative method would be a better option than quantitative one in this case for a number of reasons. Firstly, this research is looking at age-friendliness not at the wider geographical context, but at the neighbourhood level. In order to ensure the depth and breadth of the dataset, an inductive analysis rather than deductive one is required, which only qualitative method would be able to fulfill. In simple terms, inductive approach is about developing theory out of empirical data and is often associated with qualitative method; while deductive approach is about proving existing theories through empirical data, which is most associated with scientific investigation and quantitative method (DeCarlo, 2018). Hence, unlike deductive approach where usually one or more hypotheses are set to be tested prior to data collection, this research adopts the inductive approach, hoping to draw on existing case studies to understand what age-friendliness actually means. Secondly, this research is looking into the different actors involved in the age-friendly process within communities, so it is rather qualitative method other than quantitative, that could possibly capture the complexity and nuance in the interplay between these actors. At the same time, since qualitative methodology is often associated with an interpretivist/relativist (refer to Fig. 3.1 for details of relativism) point of view which is adopted in this study, it is only through in-depth analysis of individual cases can the subjective meaning of age-friendliness be revealed, and the question of how age-friendliness is being played out be answered. Moreover, qualitative

method is able to generate a detailed picture of particular cases or people, which in this case, is able to contextualize age-friendly policies and practices in each place through researchers' interactions with the people within specific contexts, rather than generalizing the cases into an overall big picture. For all the above reasons, this research adopts a qualitative method, which is in the forms of comparative study approach and case study approach.

Characteristic	Quantitative	Qualitative
Metatheory	Positivist, Postpositivist	Interpretivist
Nature of reality	Singular, stable, independent of observer; external reality	Multifarious, culturally determined, socially constructed; holistic reality,
Relation of investigator to what is studied	External, observing from the outside; in artificial setting	In the study setting, observing from within; in real-life setting
Relation to social phenomenon	Neutral Empirical	Engaged Normative
Research aim	Nomothetic; hypothesis testing; generalizing	Idiographic; hypothesis generating; contextualizing
Strategies	Structured; theory-derived variables identified beforehand; controls; operationalization & measurement	Unstructured; open-ended, theory developed during research; concepts that are rich in meaning
Typical methods	Experiments, surveys	Participant observation, case studies
Criteria for judging research	Validity & reliability; objectivity	Credibility, transferability, dependability; authenticity

Table 3.1 Characteristics of quantitative and qualitative methodology (Lor, 2019)

3.3.2 Research Strategy: Multiple case studies & comparative studies

I. Case study approach

Case study approach is defined as "an empirical inquiry that investigates a contemporary phenomenon within its real-life context; when the boundaries between phenomenon and context are not clearly evident; and in which multiple sources of evidence are used" (Yin, 1984). With its ability to go beyond the quantitative statistical results and provide a better understanding of phenomena through a bottom-up perspective, the case study approach is considered a "robust research method particularly when a holistic, in-depth investigation is required". As researchers nowadays are more aware of the limitations of quantitative methods in providing in-depth and holistic explanations of social issues, case study approach is hence a better alternative (Zainal, 2007). As this study aims at understanding age-friendliness from a bottom-up perspective, i.e., at the community level, picking a community as a case study would be the most reasonable way of achieving this aim. Details such as the characteristics of different actors, the way they interacted with each other, and how they made decisions in specific incidents throughout the process, are

better captured by qualitative methods. Case study approach, with the richness of details it is able to provide, would be more suitable to further enrich the understanding of the age-friendly process, and most importantly, be able to answer the research questions of what actors were involved in the age-friendly development and how the process is being governed.

There are various types of case study approaches as suggested by Yin (1984), Baxer & Jack (2015) and Stake (1995): explanatory, explorative, descriptive, multiple-case, intrinsic, instrumental and collective, which are compiled in the following Table 3.2. Some categories are interchangeable due to the very similar natures, under different categorization systems developed By Baxter & Jack (2015), and Stake (1995).

Case study type	**Definition**
1. Explanatory	To "explain the presumed casual links in real-life intervention that are too complex for the survey or experimental strategies" (Baxter & Jack, 2015)
2. Explorative	To "explore those situations in which the intervention being evaluated has no clear, single set of outcomes" (Baxter & Jack, 2015)
3. Descriptive	To describe "intervention or phenomenon and the real-life context in which it occurred" (Baxter & Jack, 2015)
4. Multiple-case study	A study that involves more than one case study (Baxter & Jack, 2015)
5. Intrinsic	The study of a single case for its own sake (Stake, 1995)
6. Instrumental	A case study with only a small group of subjects selected (Stake, 1995)
7. Collective	Data will be collected from difference sources (Stake, 1995)

Table 3.2 Types of case study approach

In order to ensure a more holistic picture of how age-friendliness is being materialized and practiced in both Manchester and Hong Kong, this project adopts descriptive and collective case study approaches. As each case contains certain unique geographical, political, social and cultural elements that are believed to influence the perceptions towards ageing and age-friendliness and guide the actions of different stakeholders, it is important to give a detailed description of how age-friendliness is being developed and enacted, through gathering information from different sources. This is backed by the concept of triangulation of data, which will be discussed further in the later part.

II. Comparative study approach

A comparison can be defined as "a mode of scientific analysis that sets out to investigate systematically two or more entities with respect to their similarities and differences, in order to arrive at understanding, explanation and further conclusions" (Azarian, 2011). There are two

reasons why this study adopted a comparative study approach. First, as clearly discussed in the Chapter 2, there are very few comparative studies of age-friendly policies in more diverse settings in terms of governance, welfare system, demographics, culture etc. There is also rarely a study that digs deep into case studies as wide as at the city level, and as detailed as at the neighbourhood level. Hence, in order to find out how age-friendliness (either under the WHO model or not) is interpreted and materialized, with counter references to more than one singular case, comparative study approach would be a better way than single case approach. This research, in accordance with Kocka (1996), can be considered using a "contrastive comparative method" – a kind of analysis usually adopted and motivated for better identifying one's own uniqueness (Azarian, 2011). Kocka explained that this method is "often the look into the other country, the other society, the other village or the other part of the world affords better understanding of one's own history"(Kocka, 1996, p. 202). Regarding age-friendliness, the questions to be answered are what particularities can be found in the two cases, and what that tells us about how age-friendliness is being materialized in two different contexts. Here, I shall not define this comparative study being a "cross-country comparative research", but merely "comparative research" because this study is interested in highlighting the specific local characteristics of the two case studies such as the interplay and the attitudes of actors, but not too much emphasis on the cross-national differences which are mostly based on the wider factors such as political, socio-economic and cultural systems of the two cases. These characteristics are not necessarily adhered to specific countries, but usually vary place by place. So there should not be any assumption made about the case studies in this research being able to provide an overall generalization of two countries in their age-friendly strategy and practices.

In addition, Robinson, et al. (2016; 2021) introduced another perspective of comparative urbanism. They identified two grounds for comparative study: "generative" and "genetic". "Generative" ground involves research starting with some "shared features of diverse urban experience"; while "genetic" ground is for "comparing rest on the prolific interconnections (finances, ideas, people, materials) which tie many urban settings into shared circuits – tracing these can inspire effective comparisons across differentiated outcomes" (Robinson et al., 2021). Robinson, et. al. (2021) added on to criticize traditional comparativists in generating new insights through "thinking with variety". They argued that such approach generates variety that is too often limited to relatively similar cases. Robinson, et al. (2021) then used their own study as an example for "generative" ground – a cross-national comparison between Johannesburg in South Africa, London in the United Kingdom, and Shanghai in China, in which the "shared feature" of

these three cases was the large-scale urban developments. Similarly, this research adopts a "generative" ground of comparative study, based on the shared feature of age-friendly development in Manchester and Hong Kong, in particular the adoption and adaptation of the WHO age-friendly framework.

Specific to age-friendly policy research, Buffel et. al. (2014) suggested that there are three benefits of a comparative study:

1. It provides a new way of assessing age-friendliness of a city, which is contrasting urban environments
2. It improves our understanding of the positive and negative factors of an effective age-friendly policy across different policy, socio-political and cultural contexts
3. It encourages mutual learning between cities

In this thesis, the two case studies – the Naturally Occurring Retirement Community (NORC) in Old Moat, Manchester and the Association of Concern for Elderly Livelihood (The Association) in Tseung Kwan O, Hong Kong, provide rich details to how age-friendliness is being materialized in the two diverse communities in terms of political, social and cultural contexts, the interaction between different players, and more importantly, the impacts these cases have in shaping the age-friendly development in the city of Manchester and Hong Kong.

3.3.3 Data Collection methods: in-depth interviews, participatory observation, exploratory investigation

There are three kinds of data collection utilized in this study, including exploratory investigation (mainly through document analysis), qualitative interviews, and field observation. Instead of using the three methods step-by-step, they were mixed together and used interchangeably during the fieldwork for building a fuller (if not complete) picture of the two cases. Document analysis attempted to inform discursive institutionalism, while in-depth interviews and participatory observation addressed the notion of sociological institutionalism and street-level bureaucracy, which will be explained further below.

I. Exploratory investigation/document analysis

Document analysis was used throughout the entire research, with two major functions. The first function is to construct a preliminary background of the two cases. At the initial stage of

this research, secondary data was researched and analyzed to get a brief picture of the two cases. The purpose is to obtain background information of existing policies, identify the possible stakeholders of the age-friendly process, and to be familiar with the interrelationship between these stakeholders. Secondary data may include research reports, news release, official publications, official meeting documents, websites, news articles, etc. All data was obtained either online, or through relevant parties. As the research focuses on understanding age-friendliness at both the city and community level, the search was limited to materials related to either the city strategies and relevant programmes and documents, or materials that were related to the specific case study area: Old Moat and Sai Kung. For materials on the city level, initial search was done based on the official government website, i.e., the Age-friendly Manchester (AFM), Manchester City Council and the Hong Kong government websites. For materials on the case study (neighbourhood level), the focus was on the two age-friendly research projects done in Old Moat and Sai Kung, i.e., the keywords searched were “Old Moat Age-friendly Project”, and “Jockey Club Age-friendly City Project” (JCAFC). Search was also done on the university library catalogue, with the purpose of looking for academic sources for providing background information of the two cities’ age-friendly strategies (if there was any). These documents were further analyzed together with the primary data collected from interviews and participatory observation, attempting to create a full picture of the entire situation.

The second function is to fill up the missing pieces derived from interviews and participatory observation. After the initial document analysis, there were a few missing dots that could not be connected together, for example, the age-friendly research project in Hong Kong had yet to cover Sai Kung district at the time of fieldwork (as the second phase of the project) and there was not much project-related work done in Sai Kung yet, so the focus was then shifted to what age-friendly related work had already been done in Sai Kung prior to the start of the JCAFC project. After realizing the years of negotiations of the community with the Sai Kung District council, a further search was done on the Sai Kung District Council website, particularly on the official meeting documents, to reveal and create the actual timeline of all the events mentioned by some of the interviewees. Some printed documents were also obtained from some of the interviewees, such as the booklet about the Tseung Kwan O Association of Concern for Elderly’s Livelihood. Similar situation was also encountered in the fieldwork of Manchester, when some of the interviewees provided other printed documents or publications that were not available online but were relevant to the case study, such as the structure of Age-friendly Manchester team and some past publications by the AFM. Hence, the document analysis process was done throughout

the fieldwork and the later data analysis period, with an update search on the documents/materials, according to data collected from interviews, so as to provide a clearer overall picture of the two case studies. The full list of documents reviewed is shown in Appendix I.

The method of document analysis attempted to inform the discursive institutionalism mentioned in Chapter 2. The documents reviewed and analyzed represent both forms of discourses suggested by Schmidt (2008), which were presented by local authorities, government officials, social service organizations, academics, or even the communities depending on the nature of the documents. For example, the booklet *Cheung Kun,* published by the Sheng Kung Hui Aged Tseung Kwan O Aged Care Complex represented a form of communicative discourse by the members of the Tseung Kwan O Concern for Elderly Livelihood Association as it presented their understanding of age-friendliness through elderly empowerment and participation in the community. On the other hand, the Age-friendly Manchester represented both forms of coordinative and communicative discourses of Age-friendly Manchester team in explaining to both the public and policy actors how age-friendliness could be developed in the city of Manchester.

II. In-depth interviews with stakeholders

After getting a brief idea of the two cases through initial document analysis, interviews were conducted to collect insider information about the current situation, i.e. whether the findings from the exploratory investigation were aligned with the interview findings. The purposes of having in-depth interviews with different stakeholders were mainly to enrich details on 1) the interpretation of age-friendliness in the communities; 2) to the rationales behind the actions and behaviours of the different stakeholders; and 3) how age-friendliness is being enacted at the neighbourhood level. Interviewees include local authorities, NGOs, academics, and older people who have been (or were) involved in age-friendly development process or research. This data was crucial in analyzing the nature of the bottom-up/top-down/a mixture of both in age-friendly development at the neighbourhood level. All of the interviews were conducted in Hong Kong and Manchester during October 2018 till July 2019, and February 2019 till June 2019 respectively. Referring to Table 3.3 below, there were a number of stakeholders interviewed: namely 1) local authorities, 2) academics, 3) social/neighbourhood workers, 4) others, e.g., funder of the age-friendly research project, and 5) older people. Local authorities refer to Sai Kung district councilor and representative from the Elderly Commission in Hong Kong, and member of Age-friendly Manchester team and city councilor in Manchester. Academics are mainly scholars who are either actively involved in age-friendly research and development in both Hong Kong and Manchester, be their positions in the government or not, or have an expertise and specific insight on age-friendly

development. Older people are those who were either actively involved in community affairs or were living in Sai Kung area/the city of Manchester/Old Moat. In Hong Kong, there were a total number of 13 older people interviewed, ageing from 61-88, with five males and eight females. Among them, four were actively involved in the Tseung Kwan O Association of Concern for Elderly's Livelihood (the Association). In Manchester, a total of five older people were interviewed, who aged from 71-93, with one male and four females. Four of whom were members of the NORC in Old Moat, three of whom were members of the Older People's Assembly/Board. It is noted that there is a significant gap in the number of older people interviewed in Hong Kong and Manchester. The reason lies behind the different nature of the fieldworks in the two cases. The fieldwork in Hong Kong relied more heavily on interviews for data collection, incorporated with fieldwork observations where there was very limited interaction with the participants in the events. In contrast, the researcher was more embedded in the story of Manchester, in the sense that the participatory observations of the regular social gathering in the NORC was more of an ethnographic nature, where the researcher had much more direct interactions and encounters with the participants. On one hand, the researcher was more informed of the situation in each of the events he attended. On the other hand, the richness of the data collected from participatory observation was able to compensate the relative smaller number of interviews done in Manchester, ensuring the similar level of details in both cases. This also echoes the justification of the triangulation of data through mixed qualitative methods, as discussed earlier.

The recruitment of older people in the two study areas was through snowball sampling. According to (Bryman, 2007, 2015), snowball sampling is "an approach where the researcher makes initial contact with a small group of people who are relevant to the research topic and then uses these to establish contacts with others". As this research is adopting a case study approach, all of the potential interviewees should to any extent be involved in the age-friendly development process and are interrelated to each other in some ways or some forms. Hence snowball sampling would be a good way of connecting different stakeholders in the process, particularly because there are some stakeholders who were difficult to reach. The advantage of this type of sampling is that these people are all connected to each other as they work together on the same issue, and they have a better idea of what work each other is doing. Secondly, it is easier for the researcher to get response from people by referral as they already know the other interviewees at the beginning. In both Manchester and Hong Kong, recruitment was done through contacting relevant parties via emails or phone calls. For the Manchester case, the initial contact was made with the research team of the Old Moat project. Then they referred the age-friendly team of Southway, as

well as the Age-friendly Manchester team. From these people, the researcher got in touch with members of the Naturally Occurring Retirement Community (NORC) in Old Moat, as well as members of the Older People's Board/Assembly. Likewise for the Hong Kong case, initial contact was made with the researchers of the four research institutes, and some of them shared the contacts of the social workers of a few social service organizations in Sai Kung. Further referred by the social workers, the researcher was able to connect with a number of older people who have been active in the age-friendly matters within the community of Sai Kung District, mostly Tseung Kwan O region.

All interviewees were informed and explained by the researcher about the purpose and the content of the interview, through the information sheet given to the interviewees, and all were asked to sign the written consent form prior to the interviews, which are attached in Appendix II. All interviews were conducted face-to-face, except for one interview that was done on the phone . On average, all the interviews lasted for around an hour and a half, and at most two hours. The following table shows the list of stakeholders' interviews.

Participants	**Manchester**	**Hong Kong**
Local authorities	3	2
Academics	4	8
Social /neighbourhood workers	3	3
Others	NIL	2
Older people	5	13
Total number of interviewees	15	28

Table 3.3 Number of interviews done in Manchester and Hong Kong

The interviews were in the form of semi-structured interview, which is known to be very flexible in accommodating a wide range of research goals (Galletta, 2013) . Usually semi-structured interviews combine both "open-ended and more theoretically driven questions, eliciting data grounded in the experience of the participant as well as data guided by existing constructs" (Galletta, 2013). It is usually used when the researcher wants to collect 1) explore participants' feelings, beliefs and thoughts about certain topics; 2) to dig deeper into more personal or even sensitive issues; and 3) to collect open-ended qualitative data (DeJonckheere & Vaughn, 2019). In this research, semi-structured interviews would allow the researcher to explore more openly on the perceptions of the stakeholders in their understanding of age-friendliness, based on their experiences and involvement in the process of age-friendly development at the

neighbourhood level. As each stakeholder might have a very different story to share, semi-structured interview would give the flexibility to the researcher to probe the interviewees for further elaboration on specific answers that are relevant to the research questions.

An interview schedule was used in all the interviews as a guide for researcher to initiate discussion on the relevant topics. There were four different sets of interview schedules designed specifically for policymakers/government officials/local authorities, street-level bureaucrats, academics, and older people, and are all attached in the Appendix IV. However, the interview schedule was used as a guide more than a checklist that the researcher had to adhere to. In addition, regardless of the difference in the identities of the stakeholders, there was a universal theme among all the interviews, which is the questions around their involvement in the age-friendly development process, their interaction with and perception towards other stakeholders, and their expectation towards an ideal age-friendly community. For example, people in the Manchester case most often got asked about the Old Moat project, the NORC, or the Age-friendly Manchester program. People in Hong Kong were often asked about the JCAFC project and the Tseung Kwan O Association of Concern for Elderly Livelihood. As the stories of the two cases started emerging along the way, there were more follow-up questions developed according to the themes of the story. For instance, in Hong Kong, the Duckling Hill story emerged as an important incident showing the involvement of older people, more questions about Duckling Hill incident were included in the later interviews of those who were involved in the incident. Similar approach in Manchester, when the story of the NORC slowly emerged from the first few interviews. Interviews were transcribed verbatim for further data analysis. Some were drawn on more heavily than the others, depending on the relevancy to the focus of the case studies. Further details will be discussed in the data analysis section.

The above interview design tried to inform both the neo-institutionalism and street-level bureaucracy in the following ways. First, it is hoped to identify the informal rules in the form of symbol systems, cognitive scripts and moral templates existing among different stakeholders that possibly guided their actions and behaviours throughout the age-friendly development process, as suggested in SI. These could only be identified through interactions with the stakeholders, rather than reading through official documents. Secondly, the purpose of the interviews is to address DI, through further exploring the unofficial verbal discourses of the stakeholders, i.e., whether this is congruent with the discourses represented in the documents. Thirdly, interviews with stakeholders helps examine the relationship between different stakeholders, including the street-

level bureaucrats, i.e., what role they play throughout the process, and whether they are the "good guys" or "bad guys", as informed by both Lipsky (1969, 2010) and Hill (2009).

III. On-site and participatory observation

In addition to the above two data collection methods, on-site and participatory observation were conducted for the following purposes: 1) to observe the actual operation of various age-friendly bodies such as the Older People's Assembly and the NORC in Manchester; 2) to make connections with relevant stakeholders for potential interviews; 3) to observe the real-life interactions between different stakeholders. Participatory observation is most notable by having the "insiders' viewpoint"(DeWalt, 2011). Participatory observation is most appropriate with the presence of certain minimal conditions such as the following (DeWalt, 2011):

- *the research problem is concerned with human meanings and interactions viewed from the insiders' perspective*
- *the phenomenon of investigation is observable within an everyday life situation or setting*
- *the researcher is able to gain access to an appropriate setting;*
- *the phenomenon is sufficiently limited in size and location to be studied as a case;*
- *study questions are appropriate for case study; and*
- *the research problem can be addressed by qualitative data gathered by direct observation and other means pertinent to the field setting*

As the research is interested in understanding what is happening at the neighbourhood level, including stakeholders' understanding and interpretations of age-friendliness, the use of participatory observation is useful in studying a case. Participatory observation enables the researcher to describe "to describe what goes on, who or what is involved, when and where things happen, how they occur, and why—at least from the standpoint of participants—things happen as they do in particular situations (DeWalt, 2011, p. 12).

During the process of participatory observation, photographs and notes were taken for record. Participatory observation was done in the form of attending public consultation, activities, and meetings. The list of events and activities attended as part of the participatory observation is shown in the table in Appendix V. Please note that as explained previously, the nature of participatory observation done in Hong Kong and in Manchester is quite different. There was very limited interaction between the researcher and the participants of the events/activities due to the nature of the events being rather formal and large-scale, e.g. the closing ceremony of a program of around 60+ participants. Whereas in Manchester, the most common events attended as

participatory observation were the social gatherings of the NORC. It was in a much smaller scale, with no more than 20 people in the group, which made in-depth interactions more possible.

Participatory observation attempted to inform both the sociological institutionalism and street-level bureaucracy as stated in the theoretical framework. This data collection method allows the researcher to identify the informal rules that might not be visible in official documents or even interviews, as the events the researcher attended involved a number of different stakeholders, and only on these occasions could the researcher observes the interaction between the stakeholders, that would provide a clearer picture of the dynamics among these actors. This method also helps unravel the role and characteristics of street-level bureaucrats in both cases, particularly in various contexts, such as the social activities of the NORC and the Older People's Assembly meetings, where they had the chance to interact with other stakeholders.

IV. Triangulation of Data

As mentioned above, three qualitative methods are used, namely, exploratory investigation, in-depth interviews and participatory observations. Instead of seeing these three methods as three research phases, they are more likely to be seen as a mixture of different data collection processes that are complementary to each other, in order to provide a more comprehensive, multi-faceted picture of the issue studied.

As qualitative methods are often challenged by their reliability, validity and objectivity, a multi-dimensional perspective of the age-friendly issue with as little unbiased the data as possible as is necessary, and hence triangulation of data is an appropriate method in providing a better picture and producing a richer dataset from multiple perspectives.

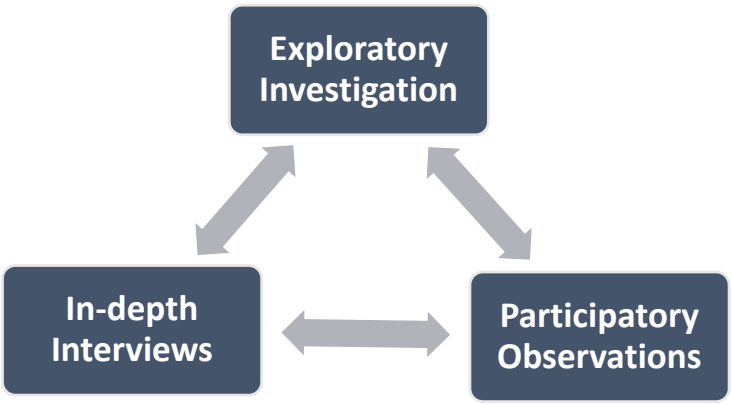

Fig. 3.3 Triangulation of data

Triangulation is most commonly referred to as “the combination of methodologies in the study of the same phenomenon”(Denzin, 1978). Triangulation is more associated with the mixed use of quantitative and qualitative methods. However, the use of mixed qualitative methods has become more and more popular. There are three major purposes of triangulation. First triangulation helps reduce biases and increase the objectivity and validity of the study(Jonsen & Jehn, 2009). Second, it makes the study more comprehensive, providing a certain level of richness in the data, and hence a more holistic understanding of the phenomenon (Greene et al., 1989). The third purpose is increasing the level of confidence of the results, as convergence may emerge through the compiling of research materials based on multiple methods. (Jick, 1979).

3.3.4 Data Analysis Method: thematic analysis

Thematic analysis is defined as “a method for identifying, analyzing and reporting patterns (themes) within data”(Braun & Clarke, 2006). It is argued by Braun & Clarke (2006) that thematic analysis should be considered a “foundational method for qualitative analysis”, and it should be the “first qualitative method of analysis that researchers should learn, as it provides core skills that will be useful for conducting many other forms of qualitative analysis”. Some believe that thematic analysis is just a common process used by qualitative methods, and that it should not be seen as a separate method (Boyatzis, 1998; Holloway & Todres, 2003; Ryan & Bernard, 2000), while a number of other authors argue that it should be seen as a standalone analytical method (Braun & Clarke, 2006; King, 2004; Leininger, 1992; Nowell et al., 2017; Thorne, 2000).

One distinctive feature of thematic analysis is that it is not tied to any theoretical, ontological and epistemological frameworks, meaning it has great flexibility to be used within a wide range of research paradigms (Braun & Clarke, 2006; Kiger & Varpio, 2020). Despite such flexibility, Joffe (2012) suggested that thematic analysis to be specifically fitted to constructivism simply because this method can illustrate how social constructs can be developed through the process of wide-scale data analysis (Kiger & Varpio, 2020). With that said, thematic analysis should be particularly useful in this study, in presenting how age-friendliness is being interpreted and reconstructed by different stakeholders, as well as being operationalized at the neighbourhood level in different geographical, political and socio-economic contexts.

Besides, Braun & Clarke (2006) also identified two level of themes, namely semantic and latent. Semantic themes “are identified within the explicit or surface meanings of the data, and

the analyst is not looking for anything beyond what a participant has said or what has been written" (Braun & Clarke, 2006);on the contrary, latent level of themes "goes beyond the semantic content of the data, and starts to identify or examine the underlying ideas, assumptions, and conceptualizations – and ideologies – that are theorized as shaping or informing the semantic content of the data" (Braun & Clarke, 2006). In other words, semantic level of themes tends to be more descriptive and addresses "more explicit or surface meanings" of data (Kiger & Varpio, 2020), while latent level involves more interpretative work, reflecting deeper underlying meanings within the dataset (Braun & Clarke, 2006; Kiger & Varpio, 2020). This research attempted to dig deeper into the underlying meanings of age-friendliness, in particular the reason why street-level bureaucrats would behave in a certain way in the two places, leading to very different outcomes.

Finally, Braun & Clarke (2006) provided a six-step guide in in their method of thematic analysis: 1) Familiarizing with the data, 2) generating initial codes, 3) searching for themes, 4) reviewing themes, 5) defining and naming themes, and 6) producing the report (Braun & Clarke,

Phase	Description of the process
1. Familiarizing yourself with your data:	Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas.
2. Generating initial codes:	Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code.
3. Searching for themes:	Collating codes into potential themes, gathering all data relevant to each potential theme.
4. Reviewing themes:	Checking if the themes work in relation to the coded extracts (Level 1) and the entire data set (Level 2), generating a thematic 'map' of the analysis.
5. Defining and naming themes:	Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells, generating clear definitions and names for each theme.
6. Producing the report:	The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis.

Fig. 3.4 Phases of thematic analysis (Braun & Clarke, 2006)

2006; Kiger & Varpio, 2020; Nowell et al., 2017), as shown in Fig. 3.4. This research used MAXQDA software, which is equivalent to NVivo in terms of its function for data analysis. For the two empirical cases, the data analysis process roughly followed the six-step guide, with initial codes of identifying different stakeholders in the two places:

Manchester	**Hong Kong**
1. Age-friendly Manchester	1. Sai Kung District Council
2. Older People's Board/Assembly	2. Tseung Kwan O Association of Concern for Elderly's Livelihood
3. Southway Housing	3. Jockey Club
4. The NORC	4. Sheng Kung Hui Tseung Kwan O Aged Care Complex
5. Academics	5. Academics

Table 3.4 Initial codes according to different stakeholders

The next step was to collate these initial codes into potential themes. So the researcher tried to group the actors into “top-down”, “bottom-up” and “street-level bureaucrats”. This was trying to capture the process happening at different levels, with a focus at the neighbourhood level, and how the city level influenced the neighbourhood level. These are the general structure of analyzing the two case studies.

For the comparison chapter, a further step of redefining the themes, based on the findings from the two empirical chapters and the research questions, was carried out. The three themes on “adaptation/adaptation of WHO model”, “the top-down vs bottom-up stakeholders” and “the role of street-level bureaucrats” were finalized and used in the comparison of the two cases.

3.4 Ethical Consideration

This research was granted the ethical approval by the Department of Urban Studies and Planning at the University of Sheffield, regarding methodology, data collection, participant recruitment, consent, data processing, data confidentiality, and data storage and safety (Please see Appendix III for the ethical approval letter). Several ethical considerations were taken into account to make sure that this research was conducted in an appropriate manner.

In compliance to the ethical considerations, there are a number of measures adopted. For in-depth interviews, all participants were presented with a printed information sheet (attached in the Appendix II), with further verbal explanation by the researcher. They were allowed time to ask questions about the research if needed. Then they were presented with a written consent form (please refer to Appendix II), on which they would sign to confirm their consent in participating in the interviews. All the interviews normally lasted for an hour and a half, and at most two hours. Participants were informed earlier they could leave the interview at any point if they wished to. Permission to have the interviews recorded was also obtained from the participants through the written consent forms. All participants agreed with the tape recording of interviews.

There are also a number of measures to ensure data confidentiality, due to the personal nature of the content of the interviews, participants were well informed of the anonymity issue, and that only pseudonyms were (would be) used in the dissertation and any future publications, to protect their identities. Also, data was stored in an encrypted computer, with a copy of the data securely stored in an external hard drive, protected by strong password.

3.5 Conclusion

This chapter has provided an outline of methodological choices, which are well justified through a consistent line of argument, from the how the philosophical assumptions of relativism

and constructivism leads to the data collection methods. The purpose of developing this carefully designed research plan was to ensure that the richness of the data generated is sufficient enough to support the development of this thesis. The first section outlined the philosophical assumptions behind the study. The second section described in detail the research design, including the research approach and strategy, the data collection methods, and data analysis. The chapter ended by providing details on the ethical consideration. The next three chapters are the empirical chapters of this thesis, with Chapter 4 presenting the Hong Kong case, Chapter 5 the Manchester case, and Chapter 6 a comparison of the two cases.

CHAPTER 4
"CHEUNG KUN": THE EMPOWERMENT OF THE TSEUNG KWAN O CONCERN FOR ELDERLY LIVELIHOOD ASSOCIATION IN SAI KUNG DISTRICT, HONG KONG

4.1 Introduction

This chapter looks into the Hong Kong example which draws on the case study of Sai Kung District. A neo-institutionalist lens was used, in particular the sociological and discursive neo-institutionalist perspectives, to understand how age-friendliness is being interpreted and enacted on both city and district level. The case study of Sai Kung demonstrates how age-friendliness can be manifested from bottom-up, as a result of a relatively weak top-down force at the city governance level. The story of the Tseung Kwan O Concern for Elderly Livelihood Association (The Association) is the key focus of this case study, providing rich details of the process in which age-friendliness is being enacted through studying the interactions of the different stakeholders at the neighbourhood scale. In particular, this case study would like to highlight the role of street-level bureaucrats (SLBs) in empowering older people within the community, as well as greatly enhancing their participation in the age-friendly development in Sai Kung District.

4.2 Background

Situated at the southern tip of Southern China, Hong Kong is one of the world's most densely populated cities. Like any other cities, Hong Kong is experiencing an ageing population. According to the Census and Statistics Department of Hong Kong, the total number of elderly persons in 2016 is 1.6 million, which is around 16.6% of the total population. The growth rate of elderly population from 2006-2016 (29.6%) is around 7% higher than that from 1996-2006 (22.7%) (Census and Statistics Department, 2018). The elderly population was expected to increase by 1.2 million by 2036 and by 2066, the number of elderly persons is projected to be 37% of the total (Census and Statistics Department, 2017d). The United Nations made a similar projection of 40.6% of the population in Hong Kong aged 60 or above by 2050, which is among the top ten in the world(United Nations, 2017). With the world's highest life expectancy (SCMP Editorial, 2018) plus its high population density, Hong Kong is probably facing a more challenging ageing issue than other urban cities. Such challenge can also be an opportunity for the city to rethink its current urban development strategy, whether it is responding to the city's demographic change. In

studying the regional age-friendly policy, Sai Kung District was chosen as the case study, as it is one of the very first pioneering districts in Hong Kong joining the WHO Global Network for Age-friendly Cities and Communities (GNAFCC). The following shall give a background of the kind of age-friendly development in Hong Kong, mostly drawn on the data obtained through document analysis and interviews. Documents including official documents and reports such as the 2016 Policy Address, the *Age-friendly Hong Kong* document by the Hong Kong Council of Social Services (HKCSS), and published research journal articles. The full list is in Appendix I. Data collected from interviews with representatives from social service agencies and government bodies, and researchers were also used in this part.

4.2.1 Weak top-down force in age-friendly development

Age-friendliness is a relatively new concept that sprang up in the late 2000s, as a newly developed strategy coping with the global ageing trend. In Hong Kong, the ageing population has long been an issue. So even before the WHO age-friendly movement in 2007, there have been several existing ageing-related policies that are already in place in Hong Kong. Since the handover of Hong Kong back in 1997, the HKSAR government made "Care for the Elderly" one of their strategic policies, with the objectives of "improv[ing] the quality of life of our elderly population and… provid[ing] them with a sense of security, a sense of belonging and a feeling of health and worthiness" (Elderly Commission, 2019). The Elderly Commission was hence established in the same year, serving as an advisory body to the government with a specific focus on elderly policy (Elderly Commission, 2019). After the WHO launched the Age-friendly Movement in 2006, instead of having a standalone age-friendly policy, the Hong Kong city government claimed to have incorporated age-friendly elements into existing ageing policies. As suggested by (Chan et al., 2016, see 3. in APPENDIX I), these policies, mostly covering healthcare, welfare and social services, are implemented by corresponding policy bureaus, departments, such as the Labour and Welfare Bureau (LWB), Transport and Housing Bureau (THB), and the Social Welfare Department (SWD). Schemes such as Old Age Living Allowance, Government Public Transport Fare Concession Scheme for the Elderly and Eligible Persons with Disabilities, Old Age Allowance, Health Care Voucher Scheme, Opportunities for Elderly Projects and Comprehensive Social Security Assistance are a few examples that attempted to address the WHO domains of housing, transport and mobility, and community and health services (Amoah et al., 2021, see 1. in APPENDIX I). The only official Age-friendly "strategy" was the document entitled "Building an Age-friendly Community" (See 6. In APPENDIX I) that was published as part of the city Policy Address during CY Leung Administration in 2016, in which it focuses mostly on improvement of physical environment only, for example

enhancing accessibility and improving living environment such as home modification, without addressing other WHO domains such as social participation or social inclusion (Hong Kong Special Administrative Government, 2016). Even though this document showed "some degree of political will and support", Philips et al. (2018) (see 10. In APPENDIX I) questioned "whether [the strategy] will be developed seriously". The city government prioritizes getting the accreditation of the GNAFCC over developing age-friendliness on the ground, as seen in a lack of actual age-friendly practices that cover a wider scope of all the domains at both city and neighbourhood level. Hence, from the neo-institutionalist perspective, the overall discourse of the government in the AFC development are as follows: first, it is salient that the overall discourse of the city ageing policy does not see age-friendliness as the centre of their ageing policy strategy. This explains why it remains on the periphery of the ageing policy agenda. Even the WHO model is not being very widely adopted in the city age-friendly development. On the other hand, from a neo-institutionalist perspective, both the government discourse and the research papers informed the form of coordinative discourse described in discursive institutionalism, in the sense that they focus mostly on policymaking; in other words, horizontal communication within the government, and at different levels of governance, that rarely involves vertical communication between the government and the public. Despite the effort of decentralizing the AFCC implementation to the district councils as well as the local social service agencies and the emphasis of a "bottom-up approach" in AFC development, the kind of communicative discourse is not widely documented and discussed in detail in the official discourse of AFC development. It is also not very clear how such discourse and understanding of AFC has been transferred from top-down to the bottom, which is from the government to older people and the general public. This is exactly where this research hopes to investigate and address.

Despite the half-hearted "enthusiasm" of the city government in developing age-friendliness at the city level, they still see the need to get the global label from WHO, so the responsibility falls onto district councils instead, as indicated in the 2016 Policy Address, "*The Government will provide additional resources for DCs to promote the building of age-friendly communities at the district level, and encourage DCs to participate in the World Health Organization's "age-friendly community" accreditation scheme*" (HKSAR Government, 2016). This includes the city government allocating a one-off sum of HKD50,000 (GBP 4,900/USD 6,400) to each district council for applying to the Global Age-friendly Network. Since then district councils have been taking up a key role in age-friendly development on a district level. Here I try to avoid using "policy" for two reasons: first, there is no strategic policy on age-friendliness on the city

government level, it would be not be accurate to describe the age-friendliness being practiced on district level as a form of policy implementation. Secondly, the stories that I am going to uncover in this chapter began even before the WHO age-friendly movement. So the narrative goes beyond the WHO model, but rather focuses on the discourse, manifestation and materialization of the idea. The half-hearted attempts by the city government actually results in a more favorable environment for the bottom-up age-friendly development to take place. Hence with very limited resources from the government, district councils are left with no choice but to rely on community resources to develop age-friendliness within their own district. With that said, the weak top-down force actually allows more freedom for districts to maneuver around the WHO domains, designing their own age-friendly agenda that best fits the needs of the community, and Sai Kung District Council is one of most high-profile districts within the city in practicing this bottom-up age-friendliness.

4.2.2 Other efforts in age-friendly development at the city level

While the HK city government puts minimal emphasis on age-friendliness in the city's ageing policy, there are a few other parties that devote their efforts in promoting age-friendliness in Hong Kong. One of them is the Hong Kong Council of Social Services (HKCSS), which initiated the age-friendly movement in Hong Kong since 2008. The Hong Kong Council of Social Services (HKCSS) is a federation of non-government social service agencies established in 1947, representing over 480 agency members, dedicating their efforts into service development, cross-sector collaboration, sector development and policy advocacy, with elderly services as one of the themes. The HKCSS is a trailblazer in age-friendly policy development in Hong Kong, as they were the first to respond to the age-friendly city movement initiated by the WHO back in 2006. Two years after, they formed the Age-friendly Hong Kong Steering Committee, aiming at promoting age-friendliness among the general public, facilitating the participation of older people and other stakeholders in designing a better plan to improving quality of life for older people, and promoting information exchange regarding good age-friendly practices (Chan et al., 2016; Phillips et al., 2018, p. 125). As the HKCSS launched the Age-friendly Hong Kong movement, they published a document entitled "Age-friendly Hong Kong" (see 5. In APPENDIX I), in which the Committee developed a clear goal in the age-friendly development, which is mainly promotional education for both public and private sectors, encouraging age-friendly development from both sectors. It also detailed how older people had been and can be involved in the process, such as training AFCC ambassadors who gave talks to secondary school students (Hong Kong Council of Social Services, 2012). S, one of the managers of HKCSS explained in the interview that the HKCSS adopted a

"triple-track approach" – appreciation scheme, community participation and baseline data. The first track is appreciation scheme that was launched in 2010. S described as a necessary first step in the whole process of age-friendly policymaking,

> *"…at that time we adopted the role of showing appreciation, so meaning [we aim to find out] what are the things/ practices that are available in HK and are appreciated by older people…. As for government departments, they started from awareness, getting to know what age-friendly community is. They might not know what it is beforehand, so we want to better their understanding through this appreciation scheme, then going further to a deeper discussion." [one of the managers of the HKCSS, S, interviewed on January 28, 2019]*

The second track is community participation through the help of DCs. S explained that they approached the district councils because of their authority, network and resources within the districts. They started with a pilot scheme in Phase 1, with 4 districts namely Kwai Tsing, Sai Kung, Central & Western, and Southern Districts taking part. The HKCSS aims at covering all 18 districts by the end of 2013. At the same time, they also mobilized various elderly service organizations to have a discussion with the DCs, with the initial aim of applying to the WHO Global Network. S described how DCs are involved in the process,

> *"We even, as HKCSS, together with DECCs, discuss what are needed for DC to apply to the Global Network, because we want to learn more about it, and really participate. We don't want to have the label only. So in discussion with DECCs and older people, we found out that in some district councils, it's better to have at least one elderly representative, and to have the significance of the representative. So at that time district councils started to set up an age-friendly working group…The second requirement is that in these working groups, there should 1/4 of elderly participation in the meeting. This is to make sure that elderly voice will be heard. Some district councils are already adopting this kind of way in running the working groups, including Sai Kung, Kwai Tsing, Tsuen Wan, Sha Tin, etc. This is the second track." [one of the managers of the HKCSS, S, interviewed on January 28, 2019]*

Lastly, the third track is developing their own indicative data [baseline data]. According to S, the HKCSS did some data mining based on the 8 domains of the WHO age-friendly model. They invited

some older people to a focus group to expand the 8 domains into 24 indicators/themes, with 3 in each domain. Based on these themes, they collected data from government departments/websites. They then presented the results to the Chief Secretary for Administration's Office, which is a special project team under the city government for preparing Elderly Vision 2030.

Having a huge network of social service agencies in Hong Kong, the HKCSS described themselves as the "mediator" between the NGOs, and the government in age-friendly policy development. The HKCSS discourse clearly fill in the gap the city government fails to address – it informs the communicative discourse of AFCC, making sure how the AFCC concept can be passed down from top-down to the public. The "preparatory" work done by HKCSS has laid an important foundation and catalyst for NGOs and older people to engage in age-friendly community work. One point to note is that Sai Kung District is among one of the few districts chosen by the HKCSS for developing their baseline data.

Other than the HKCSS, the Hong Kong Jockey Club and Charities Trust (The Jockey Club) is another important actor in the city's age-friendly development in recent years. Being one of the world's top ten charity donors, the Hong Kong Jockey Club Charities Trust is a philanthropic organization that serves 10 principal areas of social and civic needs, one of which is Elderly Services. In response to the ageing population in Hong Kong, the Hong Kong Jockey Club launched a 5-year Jockey Club Age-friendly City Project (JCAFC project) in 2015 with an initial funding of over HKD 100 million (GBP10 million/USD 13 million). This very first city-wide project on age-friendliness is in collaboration with four research institutes from local universities, namely Jockey Club Institute of Ageing of the Chinese University of Hong Kong (CUHK), Sau Po Centre on Ageing of the University of Hong Kong (HKU), Asia-Pacific Institute of Ageing Studies of Lingnan University (LingU), and Institute of Active Ageing of The Hong Kong Polytechnic University (PolyU), and also with various NGOs in each district. The aims of the project are to provide an assessment of age-friendliness in each of the 18 districts in Hong Kong, to kickstart the momentum in creating age-friendly communities, to provide a recommendation for all districts to improve the quality of life among older adults, and to encourage public engagement in age-friendly community development through arousing public awareness (Jockey Club Age-friendly City Project, 2020). I spoke with M, the spokesperson from Jockey Club and he explained the role of Hong Kong Jockey Club being an initiator and a funder of the project. He described how the Jockey Club shared the role with the research institutes in bringing different parties together: the Jockey Club liaising with the

government, and universities connecting with local NGOs. This project created an unprecedented linkage among various stakeholders including policymakers, government departments, local authorities, NGOs, social workers, academics, and older people. Although it is not a direct platform for all parties to really get together and discuss, it is still the very first attempt to line up so many different stakeholders together in one single project. At the time of the fieldwork (around Oct-Dec 2018), Sai Kung District was among the Phase 2 batch which had just started in Dec 2018. It is hence rather difficult to discuss the impact of the project on the development of age-friendliness in Sai Kung District as it was still at the very early stage of the project when Sai Kung District was involved in the project.

Speaking of the JCAFC project, it is one of the ageing research projects academics have been involved in throughout the years. In fact, academic involvement has been evident in a number of ongoing projects at the time of the fieldwork. One example is the Hong Kong Jockey Club CADENZA project initiated and launched by the Hong Kong Jockey Club Charities Trust in 2006, partnering with the Chinese University of Hong Kong and the University of Hong Kong, with funding of HKD 38 billion (approx. USD 4.8 billion/GBP 4 billion). The project aims at creating an "elderly-friendly community which fosters positive community attitude towards older people and continually improves the quality of care and quality of life for Hong Kong's elderly" through four major components, namely community projects, leadership training and research, public education and training programme (Jockey Club CADENZA, 2022a). As part of the project, the CADENZA hub was established in 2009, as "a one-stop integrated health and social care centre managed by The Chinese University of Hong Kong" (Jockey Club CADENZA, 2022b), providing a wide range of healthcare services. Another example is the Joy Age project, also initiated and funded by the Hong Kong Jockey Club Charities Trust, in partnership with the Department of Social Work and Social Administration of the University of Hong Kong, focusing on the mental health of older people (Department of Social Work and Social Administration, The University of Hong Kong, n.d.).

Even though in these projects academics show their continuous involvement in age-friendly-related research and development, the interviews with academics in the JCAFC project showed varied positions in their roles in age-friendly development. A number of academics stated in the interviews the importance of retreat at the end of the project. They tend to stick to the belief that they were there to "train the trainers" (see quote below), that there is a certain point of retreat and leave the rest to the top-down/bottom-up stakeholders to sustain it. AZ, a

researcher of the JCAFC project, has a social work background and made it clear that the role of the university is to provide technical support, and that a good project should be able to "work ourselves [themselves] out from the picture",

> *"…because if those from bottom up are doing well, they don't need the university to be there... when you empower them, they should be able to do it on their own. So why does the university have to be constantly involved? So theoretically, if [they are] doing well, eventually [the role of] the university becomes less and less significant or redundant, or not important anymore…the WHO requires a bottom-up approach, so from day one onwards, we have never thought of not using this approach… this has fundamentally been built into the structure, that the engagement of the university would be limited, we are here to provide technical support, but technical support basically doesn't mean helping you to do [your work]. So in reality, the idea, how to implement that should be the NGO's job. May not exactly be NGO, but people in the community." [researcher of the JCAFC project, AZ, interviewed on January 2, 2019]*

Another researcher, AW, also from a social work background, shared similar views:

> *"So [our university] focuses on collaboration with the NGOs within the community, because to be honest, the Jockey Club provides this amount of funding into this project for a few years. [But] the project would end at some point, [researchers] have to withdraw. Only the social service agencies such as the DECCs are stationed within the district…only these organizations are long-lasting…So another direction we have is to "train the trainers", which is we help to train the staff or ambassadors in these organizations and these ambassadors are managed by the organizations, but not the university… we are just here to train, and the organizations trust that this is not extra work, but actually let the service users understand this [age-friendly] concept so that it is easier for the organization to provide services." [researcher of the JCAFC project, AW, interviewed on November 20, 2018]*

Even though some scholars believe that the role of academics should be temporary, their efforts and involvement still contribute largely to the age-friendly development particularly in providing evident-based research and training.

Despite the lack of city government effort, both the HKCSS and The Hong Kong Jockey Club are integral to the age-friendly development at the city level. They both play an important role in

strengthening the communicative discourse that has been lacking in the overall AFCC policy development by the city government. The HKCSS helps liaising with the NGOs within the community and informing them about the WHO framework and the domains. This makes it easier for the JCAFC project to get started when some (if not all) NGOs already developed an idea of what age-friendliness is. As for the Jockey Club, it fuels the age-friendly development with huge funding support, widespread network of various different parties, which contributed greatly to the possible involvement of the private sector in age-friendly development in the future. It is also important to highlight the efforts made by academics in the process. They are there to sow the seeds of the age-friendly concepts, so that community organizations and those stakeholders from the community would be able to continue the age-friendly work sustainably. For most community work from bottom-up, the most common difficulty they face is the lack of resources and network, which will not possibly be available without the support from big institutions like the HKCSS and the Jockey Club, as well as the academics.

4.3 The Case Study: The Tseung Kwan O Concern for Elderly Livelihood Association

The case study is set in Sai Kung District, the eastern part of Hong Kong. Being one of the eighteen districts in Hong Kong, Sai Kung district is a very unique place with contrasting landscapes: with Tseung Kwan O new town having a densely populated urban landscape, and Sai Kung area mostly natural landscape, covering the largest country park area in the city. Such difference poses challenges for Sai Kung to meet the needs of older people in both urban and rural settings. Apart from this, what makes Sai Kung different from the other seventeen districts is its pioneering efforts in pushing forward age-friendliness. It is one of the very first districts to join the WHO Global Network for Age-friendly Cities and Communities back in 2015. The Sai Kung district council is also among the very first within the territory to have older people as members of the age-friendly working group. The highly active elderly participation in community ageing issues makes Sai Kung a great example for other districts to follow. The following shall unfold the story of the Tseung Kwan O Concern for Elderly Livelihood Association (The Association) and its affiliated Hong Kong Sheng Kung Hui Tseung Kwan O Aged Care Complex (The Complex). They are very well-known within the district for their very outspoken nature and enthusiasm in community affairs. Older members of the Association and the Complex not just seek to have their voices heard in local affairs, but also fight for greater participation in the policymaking process, such as demanding equal membership with district councilors within the age-friendly working group under

the Sai Kung District Council (SKDC). The empowerment of older people of the Association is a result of years of hard work by the social workers (here we identify them as street-level bureaucrats) of the Complex. Most of them, as revealed in the interviews, are licensed social workers who either had years of experience of community development or elderly services within the same district and were familiar with the neighbourhood they were serving. This story involves a number of actors in the AF development on the community level, including the Sai Kung District Council, the district councillors, the academics who work closely with the local community, the Complex, the social workers (also the SLBs), the Association, and older people within the community. In particular, the vital role of street-level bureaucrats (SLBs) in Sai Kung district is highlighted as they definitely help to build up a stronger connection and closer relationship between older people and the district council, so that older people have more bargaining power in speaking up for the older community in local affairs. In discursive institutionalist terms, the SLBs function as a bridge for communicative discourse to emerge and thrive; at the same time, the way the SLBs acted in this case addresses the underlying "norms" and hidden "rules" in sociological institutionalism, that guide their actions and behavior throughout the AF development in Tseung Kwan O. This case study shall unpack the details of how the Association operates and how they interact with different parties within the district such as the SKDC, district councilors, social workers, etc, through the incidents of Po Lam Road North and the Duckling Hill struggle.

4.3.1 Background: Tseung Kwan O new town

Situating at the southwestern part of Sai Kung district, Tseung Kwan O constitutes only less than 10% (10.05 km^2) of the total area of Sai Kung (129.64 $km^{2)}$ (Census and Statistics Department, 2019), but holds over 90% of the population in the district (Census and Statistics Department, 2017b). As a third-generation new town that was developed in the 1980s, Tseung Kwan O is almost entirely urban land developed out of partially reclaimed land. The majority of land in Tseung Kwan O is high density residential land use, housing over 420,000 people (Census and Statistics Department, 2017c). Among them, around 15% are older people aged 65 or above, which is close to the city's average of 16% (Census and Statistics Department, 2017c). The increasing old age population in this new town puts pressure on not just the existing social and health services, but also infrastructure in better meeting the needs of older people. Tseung Kwan O will be the center of this case study, meaning the focus will be on the age-friendly development in urban setting.

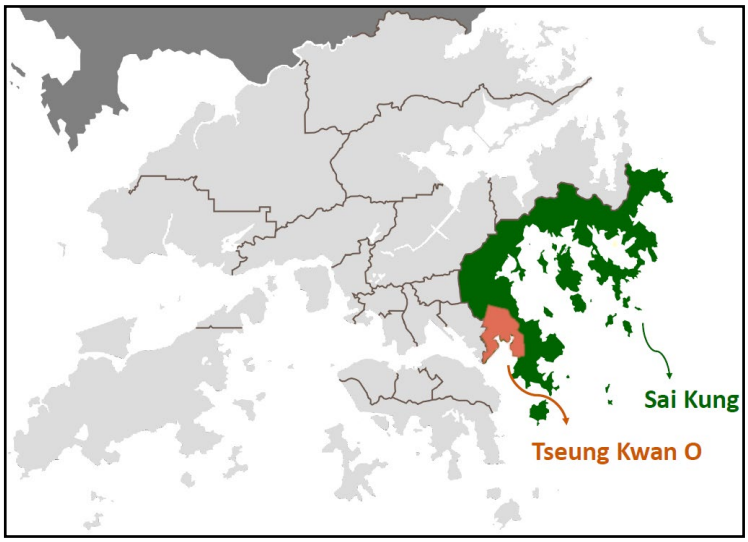

Fig. 4.1 The locations of Tseung Kwan O and Sai Kung

4.3.2 Age-friendly development in Sai Kung District

As mentioned previously, due to the lack of a clear age-friendly strategy from the top, the responsibility of developing age-friendliness falls onto the shoulders of district councils. According to Article 97 of the Basic Law of Hong Kong, "District organizations which are not organs of political power may be established in the Hong Kong Special Administrative Region, to be consulted by the government of the Region on district administration and other affairs, or to be responsible for providing services in such fields as culture, recreation and environmental sanitation" (Hong Kong Special Administrative Government, 1997), and the major stakeholders of district governance in Hong Kong are District officers and Areas Committees under the Home Affairs Department, and the district councils (Chan, 2006). District councils serve as an advisory body on 1) matters affecting wellbeing of residents within the district; 2) the use of public funding allocated to the district for community activities and local public works; 3) the priorities and adequacy of centralized programs for the district; and 4) the use and provision of public services and facilities within the district (Home Affairs Department, 2020). The source of funding within the DCs comes from the HKSAR government. There are mainly two types of regular funding allocated to DCs for different purposes, namely the District Minor Works Programme (DMW) and Community Involvement Programme (CI). The DMW programme funding is decided and approved within the DCs, while the CI programme funding is open for application to both government departments and NGOs. In this sense, even though there is no specific funding for age-friendly policy allocated to the DCs, there is a certain degree of freedom to decide on how the funding can be used, including age-friendliness promotion and education within the community.

While district councils are local authorities under the administration of the city government, its nature and function can actually vary district by district, largely depending on how they operate. For example, in Kwai Tsing District, even though they allow older people sitting in the age-friendly working group meeting, they do not have equal power as the district councilors in final decision-making within the district. Unlike other districts, the Sai Kung District Council (SKDC) functions more as a bottom-up administrative body that provides an open platform, allowing equal partnership between district councilors and older people within the age-friendly working group, and encouraging more local community participation. As elected officials, the primary duty of district councilors is to listen and respond to the needs of the community and in SKDC, as H describes, "*is among those who did more on [community involvement]" [researcher of the JCAFC project, H, interviewed on October 31, 2018]*. This is what makes Sai Kung district so unique in the age-friendly development across the city. More importantly, this creates a favorable environment for older people and the street-level bureaucrats to take actual actions and bring about changes to the community through the collaboration with the SKDC.

According to the Social Welfare Department, there must be at least one District Elderly Community Centre (DECC) in each district, aiming at providing social services to the elderly so as to enable them to remain in the community and live a dignified, respectful and healthy life (Social Welfare Department, 2005). The Tseung Kwan O Aged Care Complex (The Complex) is one of the two DECCs in Sai Kung District. Back in 2002, the Tseung Kwan O Aged Care Complex was established to cater the increasing ageing population in the densely populated new town of Tseung Kwan O. It was under the administration of Sheng Kung Hui, an Anglican Church in Hong Kong, which provides a wide range of social services across the city (Hong Kong Sheng Kung Hui, n.d.). The Complex provides day care and nursing services housing around 3,000 older residents, as well as serving elderly aged 60 or above and carers in Tseung Kwan O. As of 2013, there are over 1,300 members, with 70% of members aged 65 or above. Since 2004, the Complex has been encouraging older people participation in community affairs, through regular peer support groups and members consultation meetings in which they discuss issues around the services provided, infrastructure and environmental hygiene within the community (Tam et al., 2013). Other than community affairs, the Complex also empowers older people through setting up community concern group, and encourage older members to participate in social affairs such universal retirement scheme, social policies and monitoring candidates in the election campaigns (Tam et al., 2013).

4.3.3 Empowerment: The Tseung Kwan O Concern for Elderly Livelihood Association

What is representative about the Sai Kung case study in age-friendly development is the story of the Tseung Kwan O Concern for Elderly Livelihood Association (The Association). While there are a number of elderly initiatives mostly on the city level, such as the Elder Academy[6] that was launched by the government in 2007, and the Alliance on Monitoring Elderly Services[7] initiated by the HKCSS (Hong Kong Council of Social Services, 2012; Phillips et al., 2018, see 5 & 10 in APPENDIX I on p 167), local elderly initiatives are indeed quite rare, but the Association is one of the few that has been quite well-established and active. Affiliated with the Hong Kong Sheng Kung Hui Tseung Kwan O Aged Care Complex (The Complex), the Association was formed by an originally loose group of older people who care about their own community but could not find ways to make any changes. The establishment of the Association enables them to form a more solid group that could possibly make their voices heard through collective action. They play a crucial role in the age-friendly development in Sai Kung District, but this would not be a success without the presence of the street-level bureaucrats (SLB), the social workers and the Complex in this case, in creating a strong bottom-up force in shaping age-friendliness on the district level and connecting older people with other stakeholders including the district council, academics, government departments and so on. It is a clear example of how the *discretionary power* (in Lipsky's term), if being used properly and appropriately by the SLBs, would be able to create a more desirable outcome for different stakeholders in age-friendly development and manifestation. E, a member of both the Complex and the Association described the importance of having the Association as a platform for voicing out:

> *"Basically it's [The Association] not managed by the Complex. It's initiated by members of this center, because when we see something unreasonable that we wish to voice out, it's quite difficult to do it individually due to limited individual effort. So how do we express our views? On an individual basis? They [local authorities] would not bother. So we express ourselves through the Association." [member of the Association and the Complex, E, interviewed on December 21, 2018]*

[6] The Elder Academy Scheme was launched in 2007, as a form of social inclusion, participation and education initiative, with the aim of providing older people access to learning opportunities in schools including university campus, incorporating the approach of "university at third age" (Phillips et al., 2018)

[7] Alliance on Monitoring Elderly Services was established in 2000 as a continuation of the organizing committee of the Senior Citizen Day 2004. It comprises of older people representatives of major social service agencies in Hong Kong. It has two aims: to critique and monitor the government on elderly issues such as healthcare, social care services, retirement schemes, etc; to enhance better understanding among older people and their carers on these elderly issues (Hong Kong Council of Social Services, 2006)

In fact, the Association and the Complex are indispensable to each other, as the Complex relies on this platform to understand the needs of older people, and the Association relies on the Complex's resources to have their voice heard and demands met.

One unique nature of the Association that makes it different from other older people initiatives is a very strong element of empowerment and equal partnership. Even the title of the booklet introducing the Association says it all (see Fig. 4.1): "*Cheung Kun"* (Tam et al., 2013) *(see 11 in APPENDIX I)*, having triple meanings of "power of older people", "growing power" and "being in power", which could be combined into "the growing power of older people". This is a very powerful publication in a sense that it documented how older people voices have been able to be transferred to high level of district governance, so that policies can be improved in according to local needs. This is a good example of effective communicative discourse can empower older people in creating age-friendly communities in their own terms. Social workers from the Complex strongly believe that it is a "civil right" for older people to participate, as what L, one of the social workers said,

> *"We believe older people have their own potential, and older people aspire to live a meaningful life. Meaningful life means participation in their own lives and living environment, and more importantly, having an impact on these. And we believe this is a civil right…I think the relationship that we've built up with the aid recipients is actually a very valuable asset. It's like growing up with them." [social worker of the Complex, L, interviewed on December 13, 2018]*

With this belief in mind, the social workers of the Complex applied the "empowerment-oriented social practice model" as detailed in the booklet "Cheung Kun" (see 11 in APPENDIX I) (Cox & Parsons, 1994) as the conceptual framework behind their work, which contains four components:

1) Validation of attitudes, values, beliefs and collective action
2) Development of critical knowledge
3) Development of skills

4) Taking action (Cox & Parsons, 1994)

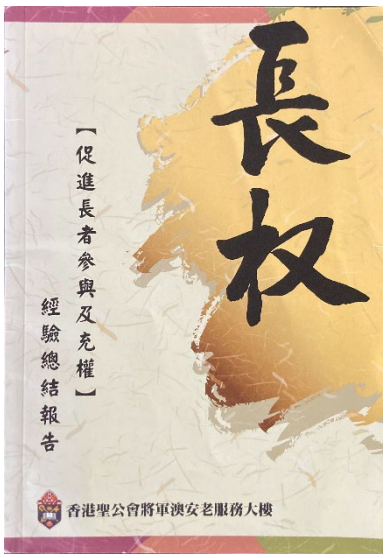

Fig. 4.2 The Booklet "Cheung Kun" (Tam Wing-ming, 2013)

In the account of the Association, the empowerment process involves assisting older people in developing their own capacity and capability, mobilizing their own resources in solving problems on an individual, collective and community level (Tam et al., 2013). The social worker L, who works closely with members of the Association, emphasizes a lot on developing an equal partnership with older people:

> *"We believe that social workers and older people both have their own strengths. Social workers are more familiar with the governmental structure, and better in doing research on certain issues; while older people know better what they need, how the environment and the urban design can better cater their needs. They also have a better social network with other older people within the community." [Social worker of the Complex, L, interviewed on December 13, 2018]*

L further describes how the partnership works:

> *"Once the issue is identified by older people, we [social workers] would do research together with them, informing them of what are needed to solve the issue: the background information, the connections they need, as well as the skills needed. Skills such as negotiating with the district councilors, who are the candidates in the current district council elections, which government departments are responsible for this particular issue… these are info that social*

workers have easier access to…and then we [both social workers and older people] would analyze the information, design an action plan, and agree on a good timing for action together." [Social worker of the Complex, L, interviewed on December 13, 2018]

This empowerment model is the central idea behind all the work done by the Association, which is making members of the Association feeling empowered through their continuous involvement in community affairs. In the next section, I shall unfold two stories that are the best illustrations of how older people were empowered and eventually made significant changes to their community through collective action and partnership. One is the "uprisings" of Po Lam Road North and Duckling Hill, which tells the story of how older people fought for better infrastructure within their neighbourhoods. The other one is the story of how older people succeeded in getting equal partnership within the age-friendly working group in SKDC. These stories witness the gradual emergence of a powerful group of older people who continue their advocacy work in Tseung Kwan O area.

4.3.4 The "Uprisings" of Polam Road North and Duckling Hill

Both the Po Lam Road North and Duckling Hill incidents are quite similar in nature, as both illustrates how important the work of SLBs is in empowering older people and making their voices heard. The difference between the two is that the Po Lam Road North struggle happened before the establishment of the Association while Duckling Hill struggle happened afterwards. The Duckling Hill struggle shows a more powerful and effective force from bottom up through more organized collective action in eliciting changes. In the following, I shall unpack more details about the operation of the Association through the two incidents. For Po Lam Road North incident, most of the details were collected based on the interview with L, the social worker from the Complex, while the rest was relying on the booklet *"Cheung Kun"* and news articles. As for Duckling Hill struggle, most of the information was collected based on interviews with members and social worker of the Complex and district councilor, as well as news articles and online sources.

Po Lam Road North Incident

As a new town, Tseung Kwan O is basically "Los Angelized", or vehicle driven, where pedestrian crossings give ways to roads. As a result, road crossings are rare in the district, as

sidewalks are connected by numerous underpasses built underneath the roads. The only way to get to the Complex, which is located at the far north of the new town, is to cross the road by climbing up and down numerous stairs leading to the underpasses. This route was not just very time-consuming but also unsafe. There were falls reported when older people were walking the stairs. Hence, a number of older people expressed their concerns about such inconvenience, but their voices were neglected by the Sai Kung District Council as well as various government departments, particularly the Transport Department, which claimed that the construction of the crossing is "duplication of resources", with the presence of underpasses that connect the roads. Older people then gathered support from the Complex to explore what the Complex could do to help them.

By that time, which was around the year of 2007, the Complex had been in use for a few years already and the social workers from the Complex have been developing good connection/relationship with the SKDC, as they are one of the biggest elderly community centres in the district and would often get in touch with the district council regarding community affairs. They know pretty well the operation of the district council, and have a better idea than older people in how to negotiate with district councilors and government departments. One important turning point is how the social workers from the Complex made good use of the timing of the DC election in 2007 because in times of election the candidates would be willing to promise anything to win more votes. So they started off a campaign named "Ways of Sorrows" and invited local authorities and DC election candidates to walk together with older people to understand the daily hassles experienced by older people in walking the stairs:

> *"…they brought all these wheelchairs and invited the candidates to come and push the wheelchairs… they didn't let older people sit on the wheelchairs worrying that it's too heavy to push, instead they put rice on the wheelchairs and [let the candidates] walk [push the wheelchairs] up the, so as to let them understand the hassle older people are facing in their daily lives," [social worker of the Complex, L, interviewed on December 13, 2018]*

This campaign had proven to be a success, but that was not the end of the story. When the Transport Department agreed to build the road crossing, they suggested to build it on the other side of the road, rather than the location requested by older people. At that time, L and another social worker who had been working on this for two years already, think that this was better than nothing, and asked if older people would agree to this. But it was a definite "no" from them, as

they explained that it was like "*even though the sneakers look really nice, if they don't fit, your feet still hurt!" [social worker of the Complex, L, interviewed on December 13, 2018]*. They'd rather not have the crossing built, than having it at the wrong location. So L and her colleague respected their choice, and they continued the fight. Finally the proposal was passed in 2008 and the crossing was completed and put in use in January 2009.

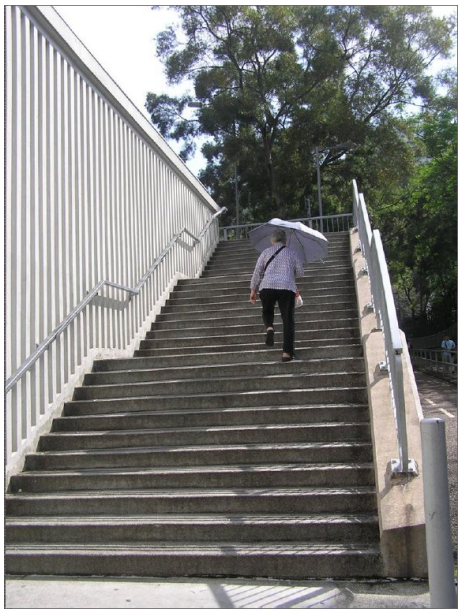

Fig. 4.3 Stairs leading to the underpasses which connects to the Complex and a clinic nearby

Fig. 4.4 Opening ceremony of the road crossing on Po Lam Road North in January 2009 (Tam et al., 2013)

According to L, this period of struggle was described by older people as "another three years and eight months [referring to the Japanese occupation of the city during World War II]".

This shows the difficulties they face when it is as simple as demanding a road crossing to be built. It was the collective effort of older people, together with the help of the Complex that made such change possible. From this, older people gained valuable experience in actively engaging in the community, that greatly encouraged and empowered them to fight for their rights. To carry on their work, the older residents formed the Tseung Kwan O Association of Concern for Older People Livelihood (The Association) in 2009 (Tam et al., 2013). The existence of such an initiative is important not just as a platform for older people to voice out their opinions, but also an opportunity for collective action. And the type of partnership between social workers and older people in the Po Lam Road North would also continue within the Association and will be seen in the Duckling Hill struggle.

Ducking Hill "Uprising"

Duckling Hill, also named Yau Yue Wan Hill, is located at the northern edge of Tseung Kwan O. It is a short hiking route stretching from Hang Hau to The University of Science and Technology in Clearwater Bay. Duckling Hill is described as "an urban fringe park" (eElderly, 2015), as it is a relatively short and easy walk and it is easily accessible. It was not until the 1980s when residents moved to Tseung Kwan O new town, that it became a popular local hiking spot, particularly for older people. Every morning, more than a hundred local residents would go there for a morning walk. As Duckling Hill grew more and more popular, hikers see the lack of public facilities on the hill an obstacle to some older hikers. Eventually, these frequent hikers (mostly older people) began to build facilities and structures on their own, such as pavilions, rain shelters, benches, stairs, and even a small garden on the hilltop. These structures were especially helpful to older hikers, not only in terms of making their hiking experience more pleasant, but more importantly, encouraging them to go out and exercise. However, since 2006-2007, the Lands Department became aware of the homemade structures on the hill (Y. C. Kwok, 2014; Tam et al., 2013). They deemed these structures illegal and announced to clear them, despite huge opposition from local residents.

Fig. 4.5 Location of Duckling Hill

Fig. 4.6 Stairs and railings built by hikers (Source: field observation)

Fig. 4.7 Chairs brought by hikers up the hill (Source: field observation)

Fig. 4.8 Homemade structure: rain shelter with chairs and plants (Source: field observation)

K, a frequent hiker at Duckling Hill, was one of the hikers who started the whole Duckling Hill struggle. Before moving to Tseung Kwan O with his wife in 2008, K has always been a keen hiker, who used to go hiking regularly with his wife. Right after they moved to Tseung Kwan O, K started exploring the area for potential hiking spots. Eventually he discovered Duckling Hill. Despite easy access to Tseung Kwan O new town, the Duckling Hill route was not a proper hiking trail. It was not even included in official maps, which is why Ducking Hill is nicknamed “the urban fringe park”. In 2010, K’s wife had a fall during one of their regular hikes on Duckling Hill. The fall made his wife wheelchair-bound ever since. Despite this, K still hoped to bring his wife to Duckling

Hill, but the lack of a proper trail forbade him to do so. There were also homemade structures that were being torn down and rebuilt and torn down again by the local authorities for a few years already since 2006. As a former civil servant, K was familiar with the government structure. He had experiences with writing letters to government departments to report various issues and to get things fixed. At that time, he was aware that there are three government departments responsible for the Duckling Hill area, namely the District Office, the Lands Department and Agriculture, Fisheries and Conservation Department. With the hope of bringing his wife back to Duckling Hill again, K filed a complaint to these government departments, demanding the construction of proper facilities on Duckling Hill, including proper trails, rain shelters, clearer label and signage, and toilets, but his requests were being either ignored, or not properly addressed.

During his hikes on Duckling Hill, K learnt about the Tseung Kwan O Aged Care Complex from other older hikers, and joined as a member of both the Complex, as well as the Association of Concern for Elderly Livelihood in 2009. After his failed attempts of contacting government departments for his request on Duckling Hill, K realized that he should seek help from the Complex. Having the experience of Po Lam Road North struggle, a wide range of strategies were adopted. There were usual tactics such as making use of DC election time to invite candidates to pay a visit to Duckling Hill and constant negotiation with the Sai Kung DC. In addition to these, the Association also collaborated with Polytechnic University of Hong Kong and a local design lab in the Duckling Hill research project, to create design plans for Duckling Hill, which were later presented at the Sai Kung DC. They also submitted a signed petition of over 1,000 signatures collected at Duckling Hill to the district officer of the Sai Kung District Office:

> *"The social worker I mentioned, Dodo, he mobilized a signed petition up the hill. 1,036 signatures were collected within just 3 mornings…The Duckling Hill incident...Dodo and I, what we did bring about some changes and impact." [member of the Complex and the Association, K, interviewed on December 27, 2018]*

Following this campaign, there was more media coverage of the Duckling Hill story because of their collaborations with various outside parties such as Gaia Hong Kong and local universities. The increased publicity urged the Sai Kung DC to take the matter more seriously. So throughout the years, several facilities including a public toilet and several rain shelters were built, trails were properly paved, and signages were improved. Even to this day, there is still follow-up by older

people within the age-friendly working group of the Sai Kung DC on the condition of these facilities to ensure a pleasant hiking environment on Duckling Hill.

Fig. 4.9 Design workshop was held by the Polytechnic University of Hong Kong

Fig. 4.10 Duckling Hill Public Toilet Project was part of the Sai Kung District Signature Project Scheme

Beyond the Duckling Hill uprising, older people continued to actively participate in community affairs through the Association and the help of the Complex. For example, the Complex partnered with Gaia Hong Kong and formed the Elderly Earth Walker, which aims at teaching older members to appreciate the nature through “Affective Nature Education”. With the help of Chinese University of Hong Kong, trainings were provided to older people to become ecotour guides, and C and K were among the 20 ecotour guides. They would occasionally give talks in schools, and lead ecotours on Duckling Hill.

> *“…we would provide talks at schools, to teach about nature appreciation and breathing class.” [member of Elderly Earth Walker, C, interviewed on January 3, 2019]*

> *“Usually introduce plants and trees and tell you those poisonous species on this hill. Sometimes people come up here as a family activity, especially at weekends, when they bring their kids. Tell them plants with colorful flowers might be poisonous. There's one that looks like the horn of a goat. Some kids find it interesting and pick it up. So I'll remind them this.” [member of the Association, the Complex and Elderly Earth Walker, K, interviewed on December 27, 2018]*

> *“Recently, they went to a secondary school to teach the breathing technique. Because as we all know the suicide rate among young people is continuously increasing, almost the same as that of older people. We all.... they are mostly young-old, with their own children and grandchildren. They believe that this breathing technique... this type of breathing technique, eventually evolves into a kind of mindfulness, contemplation. It's similar. Apart from caring for your physical health also means mental health. They believe in this way they would find their own peace of mind and can share with secondary school students.” [social worker of the Complex, L, interviewed on December 13, 2018]*

Throughout the Po Lam Road North and Duckling Hill struggles, the so-called pre- and post-Association period, one could see clearly how older people "mature" gradually: they become more confident in speaking up; they believe in the power of collective action; they feel empowered through active participation. The importance of the Association is that it further strengthens the bonding among their older members, so that they could really make changes through more organized collective action. Yet, all these would not happen without the SLBs. They do not just help older people achieve their goals, but also always make sure that they are the ones taking the active lead and having the final say. While the SLBs help with liaising with different parties, they always let older people do the negotiations themselves, such as attending meetings with district councilors and government departments and doing media interviews.

> *"…and SKH [The Complex] is very good. The Tseung Kwan O Concern for Elderly Livelihood Association. There are always volunteers who keep an eye on a lot of aspects. They would report whenever they identify any issues. Perhaps there are abundant resources here, and with those who can write, they would write to the district councilors, and invite them to our meeting." [member of the Complex, C, interviewed on January 3, 2019]*

The strong belief of older people empowerment by the SLBs is crucial in making the Association a great example of age-friendliness materialized from bottom-up. These valuable experiences definitely equipped older people with better negotiation skills and more confidence in community affairs. When the age-friendly city working group was formed under the Sai Kung DC in 2015, the Association fought for equal status with district councilors in the working group. I shall look into the details of the working group in the next part.

4.3.5 The participation of older people in the Age-friendly City working group in SKDC

Sai Kung District Council (SKDC) has established the Age-friendly City working group since 2015, with the aim of applying to the WHO Global Network of Age-friendly Cities and Communities. A sum of HKD 50,000 (GBPD4,900/USD6,400) was particularly allocated by the HKSAR government to each district council to get the accreditation from WHO. At the same time, Sai Kung District Council is the first in Hong Kong to have older people to be members of the working group, rather than as spectators of the meeting, so that they have equal power as other

district councilors in the group. Hence, Sai Kung District Council is quite well-known to be one of the relatively more "open-minded" district councils that encourages active elderly participation in district affairs. The process of gaining equal status in the working group proves years of hard work and persistent efforts by the Association and the Complex.

To trace back how the age-friendly process started from within the Sai Kung DC and eventually developed from there, I delved into the DC meeting archives and interviewed district councilor W from Sai Kung DC. As mentioned above, it was the HKCSS who initiated the age-friendly movement in Hong Kong. And one of their approaches was to collaborate with the local DCs for local policy initiation and "stocktaking". Sai Kung DC was one of the four DCs chosen by the HKCSS as part of the pilot scheme. I would divide the age-friendly policy development in Sai Kung into 3 stages: the initial, developing, and maturing.

At the initial stage, the Sai Kung DC was first introduced to the concept of age-friendliness in 2009 when the HKCSS first approached the Sai Kung DC. In one of the DC meetings, the representative from the HKCSS introduced the idea of age-friendliness together with the WHO model. The HKCSS emphasized their role as the mediator, and strongly suggested the involvement of the whole community, including not just the DC, but also other stakeholders such as individuals, households, NGOs, private sector, etc. The HKCSS promised to provide professional support if the DC agreed to take part. At that time, there was a temporary working group named "Concern for Ageing Working group" that dealt with age-friendly related issues and was dismissed in May 2011 when the DC didn't see the need to continue the group. And back then, there were no older people participating in this working group.

Two years later in 2013, in the meeting of the Social Services & Healthy and Safe City Committee (SSHSCC) age-friendliness was mentioned again as one of the sub-themes in the 6th Global Conference of the Alliance for Healthy Cities. This marked the start of the second stage, the development stage. The next year, it was proposed within the Sai Kung DC about the application to the WHO Global Network of Age-friendly Cities and Communities. To help with such work, a regular working group on age-friendly city was proposed at the same time. As district councilor W recalled,

> *"So why you see the age-friendly working group in 2015… That was when, under the healthy and safe city committee, this working group was formed. At that time, we mainly focused on getting the recognition from WHO age-friendly*

community." [District councilor of Sai Kung District, W, interviewed on January 21, 2019]

At the same time, from bottom-up, the Association and the Complex were aware of such development and discussed with the DC what they expected their role to be within the working group. Initially, the Sai Kung DC proposed to have older people sit in the meeting, without any motioning or decision-making power. The idea was rejected by older people as they demanded more than just a seat in the meeting. During one of the DC meetings, while the DC members were having their discussion downstairs, older people were upstairs, sitting in the meeting and listening attentively. L, the social worker from the Complex still recalled vivid memory about how the negotiation went,

"Mr. Stanley Tam… he is the chairperson of the Social Services & Healthy and Safe City Committee. He sent in a DC member [to go upstairs] to discuss and negotiate with us [older people]… They said 'So what about not having co-opted members? What about agreeing to have all participants [of the working group] as members? Having equal rights...you can raise motions into agenda, you can have the meetings records, whatever you say will be recorded in the minutes. And asked if older people accept this'... after that, Stanley Tam, Mr. Chow Yin-ming, Mr. Chung Kam Lun [all DC members] arranged a meeting with older people to discuss privately... We clarified the conditions, what rights older people have joining the group… We think words alone are no proof. So during that meeting, we stated clearly when exactly that they discussed with us the conditions, and what conditions that we agreed on. All these conditions were included in the attached documents of the working group meeting documents." [District councilor of Sai Kung DC, W, Interviewed on January 21, 2019]

Yet, when the age-friendly working group finally came into being in 2015, it was almost towards the end of that term of office. There was to be another DC election in 2015, and the new term would commence in 2016. As mentioned previously, the DC election is always a strategic timing for older people to make good use of in getting their demands met. DC member W mentioned this diplomatic step taken by the Complex and the Association that sped up the development of the working group,

"….it was 2015, the DC election year, the Complex in TKO urged the candidates to sign the age-friendly policy proposal. And in that proposal, one of the demands was to urge the DC to form an age-friendly committee under the DC. At that time, a number of candidates signed it. So after the election, they [the elected officials] had to 'pay back' [Keep the promise]". [District councilor of Sai Kung DC, W, interviewed on January 21, 2019].

The working group is one big step in pushing forward actual age-friendly practices within the district, with heavy involvement of older people. With around one-fourth of the members being older people representatives from the local DECCs,

"It is like an experiment. This working group isn't like how it is in regular DC meeting that they can motion, or second a motion, or amend. It's more like a round table kind of discussion, where everyone has equal rights to express…. So it is a very good communication platform for both parties [the DC & older people]". [District councilor of Sai Kung DC, W, interviewed on January 21, 2019]

The formation of the working group marks the beginning of a continuous and ongoing process of collaborative discussion and action on age-friendly issues and practices within Sai Kung, involving not just local authorities, government departments, but most importantly, older people within the community. Now, the Association does not just involve in community affairs from outside the institution. They actually got into the district council and have a voice in the working group.

4.4 Summary and Findings

The Hong Kong example illustrates a stronger bottom-up force than top-down force in age-friendly policymaking and implementation, with intricate interplay between actors throughout its development, which is summarized in Fig 4.11. The arrows in Fig 4.11, unless otherwise specified, represent generally direct and relatively stable relationships, indicating normal interactions between the two parties. Annotated arrows show more dynamic relationships that I wish to

highlight in this case study, particularly, how the role of SLBs affects the relationships between

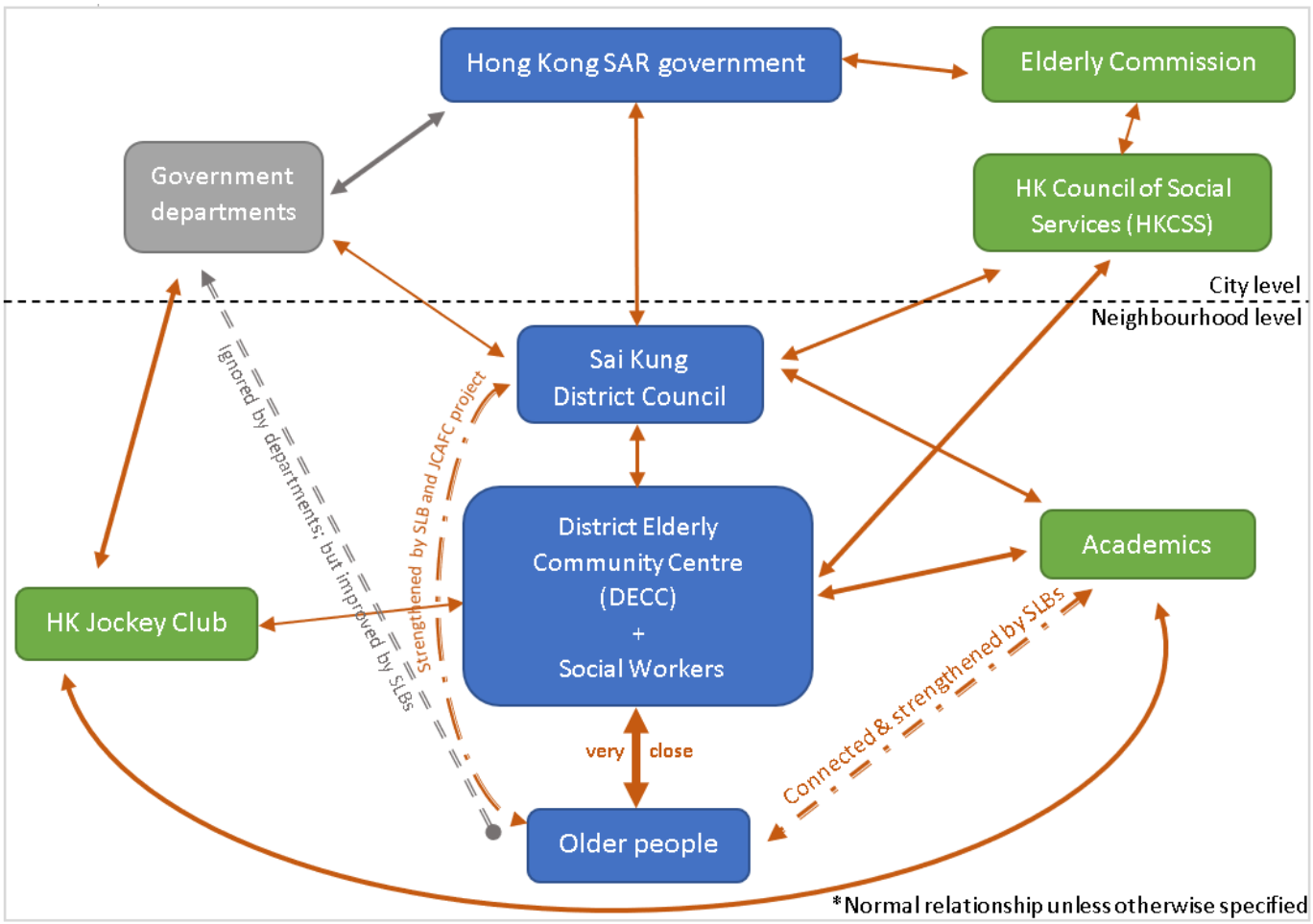

Fig. 4.11 Power Relationship in the process of age-friendly policymaking and implementation in Hong Kong

certain actors. So in the Hong Kong case, the social workers from the Complex are the SLBs who connect older people with different other parties including government departments, Sai Kung District Council and academics. They act as intermediary actors (other than top-down and bottom-up) and help strengthen the communication and interaction between older people and different other actors, with the aim of making their voices heard. It is this kind of interaction that shapes the age-friendly development in Sai Kung, with a strong bottom-up element. Besides, the stark contrast in the interpretation and materialization of age-friendliness between the top-down force and the bottom-up forces also contribute to the uniqueness of the Sai Kung case.

At the top of the administration, the city government has not been showing much interest in the WHO age-friendly model. Established 10 years before the launch of the global age-friendly movement, the Elderly Commission has already been doing the major work on ageing policymaking, so the government does not see the need to place age-friendliness into the centre of their existing ageing policy narrative, as reflected in the lack of a clear city-wide age-friendly strategy. This might also be explained by the unique political, social and economic status of Hong Kong nationally and

internationally, meaning the HKSAR government is in theory independent from the Chinese government under the "one country two system" (still so at the time of the fieldwork). In other words, the city does not rely on the Chinese government in terms of resources allocation, hence age-friendliness is very unlikely to be a good bargaining chip for Hong Kong to get more resources from anywhere else. That might explain why age-friendliness has been on the periphery of the city's ageing policy agenda. Here, age-friendliness is interpreted and represented as merely a tool for image building, with limited political value. However, interesting enough, it is rather this half-hearted mentality from top-down that favors the springing up of an enthusiastic age-friendly development from bottom-up. The Sai Kung case study is one of the best demonstrations of how age-friendliness works at the community level, even without a proper standardized age-friendly policy from top-down. It accurately captures the complexities of the interaction between different actors in the entire age-friendly development process within the district.

Before discussing about the bottom-up process happening in Tseung Kwan O, it is worthwhile to highlight the efforts of the HKCSS and the Hong Kong Jockey Club, and their significance in the Sai Kung's age-friendly development. Despite the fact that the scope of work Hong Kong Jockey Club (HKJC) and the HKCSS covers the entire city, it nevertheless benefits Sai Kung district in terms of resources and connections both parties could provide. Their work no doubt facilitates and even speeds up the age-friendly development process in Sai Kung – the initial work done by HKCSS provided a preliminary framework to follow, and the HKJC supported the development in SK with a huge amount of funding allocated to SK as part of the JFAFC project. While it was discussed earlier that the city government age-friendly "strategy" emphasizes more on "coordinative discourse" than "communicative discourse", the role of the HKCSS and the JCAFC project was exactly to fill up this gap – they provide an open platform for all these different actors at different levels, whether top-down or bottom-up or intermediary, to have constructive dialogues on how age-friendliness can be practiced and implemented on the ground. With these preparatory steps, the SKDC did not have to start everything from scratch and could develop on top of what had already been established.

With that said, the entire bottom-up process happening in Sai Kung district is more than just the story of older people fighting to improve their living environment, but the story of how age-friendliness is being manifested through the complex interplay of different actors including local authorities, NGOs, public institutions and older people. The transformation, from a loose group of ordinary older residents within the neighbourhood, to a close-knit group of empowered members

of the Association who are enthusiastic to speak up and share their thoughts about how their communities should be like, involves a complex process intertwined with compromises, failures, struggles and negotiations, and most importantly, how they interacted with other stakeholders within the communities. The presence of social workers from the Complex as street-level bureaucrats (SLBs) is the key to shaping the entire bottom-up process of age-friendly development. Here, I try to argue that the attitude of the SLBs determines the nature of the age-friendly development process. While in Lipsky's account, the SLBs tend to use their discretionary power to advance their own interests (Lipsky, 1969); but the Sai Kung case study actually shows the opposite: the SLBs made use of their own discretionary power to advance the needs of older people, from providing a platform for older people to discuss openly about their needs and concerns, encouraging them to bargain with local authorities on community affairs, to connecting them with different parities to stimulate more ideas and thoughts. The accounts of social workers and older people all point to one important finding: they share similar beliefs about age-friendliness as lived experiences, instead of a set of fixed guidelines to follow and apply. There is an explanation to their behaviors as "good guys", which has something to do with their background. As previously mentioned, some of them, like L, the social worker I interviewed, has a background of community development. Community workers in Hong Kong have a tradition of social advocacy that can be traced back to the 1970s (C. K. Wong, 1990). "Mainstream community development services" in Hong Kong are "standalone service programmes that operate alongside other social welfare service programmes funded by government", in the form of Community Centres (CCs) and Neighbourhood Level Community Development Projects (NLCDPs). The objectives of these community development services are to encourage social and community cohesion and participation, promote mutual help, serve the needs of underprivileged groups, and to build community strength (Fung, 2017). With that said, despite the official goals of the government on these projects of facilitating communication between the communities and the government, community service workers tend to adopt a "conflict approach", which resembles the confrontational strategy (Alinsky, 1989) or social action (Rothman et al., 2001). The common goals of fostering policy change, defending the socially deprived, and empowering the communities have been shared by community workers in Hong Kong (Fung, 2017; C. K. Wong, 1990). Linking this historical background of community workers with the sociological institutionalism, under which some actions and decisions made are based on "social appropriateness" over efficiency. More to that, most of the time, as SLBs, they have their own personal interests that they might want to fulfill, putting aside the limitations set by the organization they are in and/or the funders. With all these said, social workers from the Complex

who have the strong background of community development are more likely to advocate for empowerment of older people in age-friendly issues. Such advocacy nurtured a representation and discourse of age-friendliness as a lived form of age-friendliness, which is different from the WHO narrative. The inter-changeability of the eight domains is vividly encapsulated in the lived experiences of the older people in Tseung Kwan O. For example, the incidents of Po Lam Road North Duckling Hill already touch on a number of the WHO domains, such as transportation, outdoor spaces and buildings, social participation, respect and social inclusion, etc. Here, age-friendliness is being lived and experienced, rather than being designed and embedded into policy framework.

Lastly, it is worth mentioning the role of academics in this case study. Although they have been contributing to the age-friendly development throughout the years, the findings show that their role is not as significant as the role of SLBs for, because most academics in Hong Kong believe that their role is to sow the seeds of knowledge, and that there should be a point of retreat and withdrawal from the process and let the other stakeholders take up the leading role. For example, in the case of Duckling Hill uprising, the Complex partnered with PolyU in creating a design plan for the facilities at Duckling Hill. It was a one-off involvement for the researchers, and they withdrew right after the project. For the JCAFC project, it was a different team of researchers from CUHK. This shows that there is rarely a constant involvement of academics in the process, which results in a relatively marginal role in the age-friendly development process. This will be discussed further in Chapter 6.

What makes Sai Kung case study a good example of bottom-up age-friendliness is not just about the active involvement of older people in the process. It is a result of constant efforts paid by different stakeholders in the age-friendly development process. I try to avoid exaggerating the power of older people in initiating changes as that would downplay the efforts made by other stakeholders especially the SLBs. This case study would not be a successful story without highlighting the complexities of the interaction between stakeholders throughout the entire process. Nevertheless, the key argument here is the role of SLBs as the major determinant of the nature of the age-friendly development process. As SLBs are the ones in between the top-down administration and bottom-up stakeholders, the way they positioned themselves is crucial to shaping age-friendliness. In Tseung Kwan O, the SLBs stand with older people in the community, sharing their beliefs of valuing older people's voices, putting their needs in the forefront and empowering them in eliciting changes in their living environment. While it is widely agreed that bottom-up approach is the right way to apply the WHO age-friendly model, there is still variation of

how bottom-up the development process can be, and here I argue the key determinant to be the role of SLBs.

4.5 Conclusion

This chapter presented the case study of Hong Kong, with a focus on the story of the age-friendly development in Tseung Kwan O in Sai Kung district. The findings show that despite the contributions made by the HKCSS and the Jockey Club to the age-friendly development at the city level, there is still not a clear age-friendly strategy formulated at the city governance level. The relatively weak political support from the city government, together with the foundation laid by the HKCSS in the early years and the efforts of the Jockey Club in initiating the city-wide JCAFC project results in a favorable environment for the age-friendly process to develop at the neighbourhood level. The district of Sai Kung is shown to be one of the best practice examples in developing age-friendliness at the neighbourhood scale for other districts in Hong Kong. Featured by a supportive DC, and the enthusiasm of the Association and the SLBs from the Complex, the Sai Kung case study demonstrated that despite the lack of a thorough understanding of age-friendliness and the WHO framework, older residents and the SLBs developed their own version of age-friendliness in the form of a lived experience, as clearly illustrated in the PoLam Road North Incident and the Duckling Hill uprising. This outcome of the Sai Kung case, as this chapter tried to argue, is largely the result of the relatively dominant role of the SLBs throughout the process. Their great contribution proved that the SLBs can be “good guys” too, contrasting the original Lipsky’s account of SLBs as bad guys. The argument of the importance of SLBs in the age-friendly process is consistent in the Manchester case in the next chapter, in which the different attitude of the SLBs leads to a rather different outcome.

CHAPTER 5
AGE-FRIENDLINESS IN MANCHESTER: THE STORY OF THE NATURALLY OCCURRING RETIREMENT COMMUNITY (NORC) IN OLD MOAT

5.1 Introduction

This chapter draws on the case study of Old Moat, Manchester, to examine how age-friendliness is being interpreted and enacted in Manchester. Being recognized by the World Health Organization (WHO) as the very first age-friendly city in the UK, the city of Manchester has a long history of age-friendly (-related) development even before the WHO age-friendly movement. For this reason, the city has been fast in responding to this global movement, and develops their own Manchester Age-friendly strategy with WHO elements in it. Seeing the need of evident-based research in age-friendly development, the neighbourhood of Old Moat was picked as the very first age-friendly pilot project in the city and is the most cited example in the narrative of age-friendly neighbourhood in the city. From the discursive neoinstitutionalist perspective, while the official discourse of Old Moat informs a very strong element of communicative discourse, meaning a very strong bottom-up approach, the case study is suggesting a slightly different story from the official narrative. In this chapter, I will look into the neighbourhood of Old Moat and the city of Manchester, particularly in how different players interacted with each other throughout the process, and how age-friendliness is being understood and shaped in different contexts. The Old Moat case study is a good demonstration of how age-friendliness can be enacted in the community, within a wider context of a well-developed age-friendly framework from top-down. Both at the city and the neighbourhood levels, the role of SLBs in the Manchester case is instrumental to the entire age-friendly development informing how hidden rules and agenda as described in sociological institutionalism affect their decisions and behavior throughout the process.

5.2 Age-friendly strategy and development in Manchester

To understand what exactly is happening in Old Moat, and how the entire age-friendly development came into being, one has to understand the background behind the Old Moat project, which has to be traced back to what has been happening in the city of Manchester. Buffel (2014) (see 4 in APPENDIX I) provided a very detailed background of the AF development in the city of Manchester. The very first age-friendly related work can be traced back to the year of 1993, during the European Year of older people, which prompted the Manchester City Council to

develop a multidepartmental working group with the aim of exploring and expanding services for older people. Following this program was the establishment of the Better Government for Older People (BGOP) group in 1998, which was later developed into the Valuing Older People (VOP) programme launched in 2003 (Buffel et al., 2014). Older people's involvement throughout the age-friendly development process has always been at the core of the VOP Programme (VOP). As the conceptual framework developed in the original Manchester Ageing Strategy (MAS) is similar to that of the WHO framework, in terms of encouraging active engagement of older people, providing quality support and ensuring equality, it was natural for Manchester to blend in the WHO elements into their own framework (Buffel et al., 2014). Over the course of almost 30 years, the City of Manchester has been very active in age-friendly development, that was way before the World Health Organization (WHO) launched the Age-friendly Movement in 2007. They sought to produce novel strategies and drew on their experience in ageing-related strategies. Noticeably, this is a well-established top-down force at the city level, a clear-defined age-friendly strategy that has been laid down from top down for over a decade. Such strong top-down involvement in age-friendly development cultivates a favorable and supportive environment for age-friendliness to be enacted in the communities. So the key questions to ponder in this chapter are: What are the interactions between different stakeholders? How do they interpret age-friendliness and put it into practice? What are the implications of the case in terms of understanding the age-friendly process? The following shall unfold in greater detail of first the age-friendly development at the city level, and then the Old Moat project, which would be able to provide answers to the above questions.

5.2.1 From Valuing Older People Programme to Age-friendly Manchester

To start with, one should be aware of the importance of the rich complexity of relations among different players that shapes the age-friendly development in the city of Manchester. These actors include local authorities, departments, neighbourhood groups, older residents of the city, academics, and even stakeholders from both public and private sectors. One of the key policy initiatives in the entire age-friendly development is the Valuing Older People Programme (VOP), which was launched under the Manchester City Council in 2003, with which Mr. Paul McGarry was the strategic lead. It was a team of around 8-10 staff from National Health Service, local government, a housing trust, an arts agency, a national charity, and a local university (Buffel et al., 2014) (but was later shrunk into a team 3-4 members, resulting from the national budget cuts in

2010) under the Manchester Health and Wellbeing Board[8] of the Manchester City Council. The VOP programme was later renamed into Age-friendly Manchester (AFM), right after the city of Manchester was recognized as the very first UK city joining the WHO Global Network of Age-friendly Cities and Communities in 2010. Following the WHO Age-friendly Movement, the city of Manchester incorporated the WHO 8 domains into their three key priorities: 1) develop age-friendly neighbourhoods; 2) develop age-friendly services; and 3) promote age equality (Age-friendly Manchester, 2017). Despite the retitling and huge budget cuts, AFM remains basically the same in terms of its overall visions, objectives and operations, with WHO elements in it. Given the amount of work they had already done before the WHO, they did not just "copy and paste" the WHO framework but incorporated it into their already well-established framework. Buffel et al. (2014) identified three important features of the AFM and the MAS:

1. *Political leadership: high-level political support was received from elected council members*
2. *A local narrative: the development of an account of urban ageing rooted in the city's disadvantaged communities*
3. *A partnership strategy: the city has published two strategic statements creating a framework in which agencies can combine at citywide and neighbourhood levels to achieve common objectives* (Buffel et al., 2014)

Apart from a well-developed ageing strategy, it is crucial to highlight the role of the AFM team, which I define as street-level bureaucrats (SLB), as they work closely with the Manchester City Council and other departments, as well as older people from different neighbourhoods across the city. Given the nature of the AFM programme being at the city scale, their work focuses on the city of Manchester as a whole rather than targeting a specific neighbourhood. Nevertheless, the role of the AFM team as SLBs is instrumental to the age-friendly development at the city level. The following will highlight some of the major works done by the AFM programme, including examples of initiatives, programmes and publications.

The AFM programme is characterized by its publicity, great involvement of older people, and extensive work done across the city. First and foremost, the Valuing Older People's Board and the Older People's Forum were formed (later renamed into Older People's Board and Older People's Assembly respectively) a year after the VOP Programme was launched. The Board is

[8] The Health and Wellbeing Board is a statutory committee of the Manchester City Council "responsible for leading a collaborative approach to improving the health and wellbeing of Manchester residents and reducing health inequalities" (The Manchester Partnership, 2021)

comprised of elected members from the Older People's Assembly, while the Assembly is composed of members who are older residents from across the city of Manchester, together with representatives from key neighbourhood groups, including the LGBT Foundation, the BME Network, The Wythenshawe Good Neighbours, the Levenshulme Inspire and Manchester Carers Forum, and two city councilors Mary Watson and Sue Cooley. The current chairperson of the Board is Elaine Unegbu from Chorlton. The Assembly and the Board act as consultative bodies for older people to voice out their needs and concerns. The Age-friendly Manchester team holds the Assembly meetings once every six weeks, which serves as an important platform for different parties to communicate and discuss age-friendly matters, as well as sharing good practices across the city.

> *"What we do, we are … to capture what they [older people] would want, because we are representing older people. We had the different tables, where the discussions would take place. And all these discussions have taken together…which is very important for older people. And older people should have their say. And this is because older people are representing their communities, they go back to their own local areas and they could tell them. Otherwise, how to capture their views? The community views. What other … mechanism would we be able to capture? I think this is the mechanism whereby we can capture that and feed it back." [member of the Older People's Board and Assembly, G, interviewed on 30 December, 2019]*

Local departments also make use of this meeting as a consultation and communication channel to seek advice from older people in new projects of urban development and infrastructure. For example, in 2019, the Strategic Regeneration Service Department sat in one of the Assembly meetings to speak about the biggest regeneration project, The Northern Gateway project, and sought advice and suggestions from members. Another example was during the time of the fieldwork, in one of the Assembly meetings the researcher attended, which was held on 21

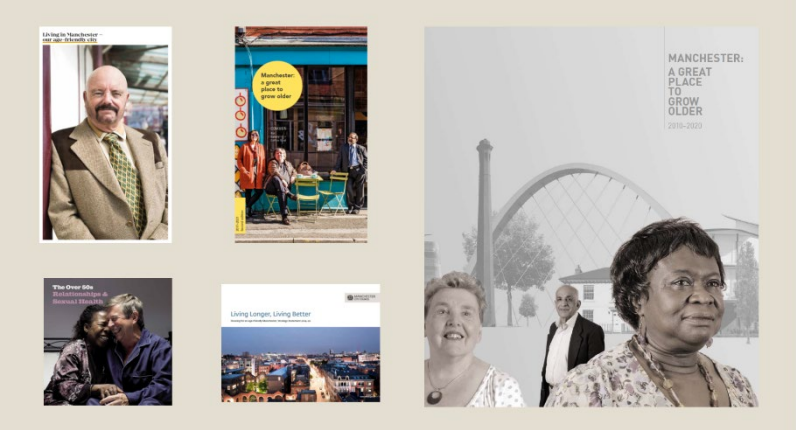

Fig. 5.1 Selected publications from AFM. From left to right, top to bottom: Living in Manchester: our age-friendly city (2016), Manchester: a great place to grow older (2017-2021), Manchester: a great place to grow older (2010-2020), The Over 50s, Relationships (2014), and Living Longer, Living Better: Housing for an Age-Friendly Manchester Strategy (2014)

November, 2019, there was staff from the Transport for Greater Manchester coming to the meeting to collect feedback from members over their new scheme "Doing Buses Differently".

The very active approach of the AFM in engaging older people in policymaking has also been consistently shown in various of their publications throughout the years. Coming from both within and outside the AFM, there have been a significant number of publications in promoting age-friendliness across Manchester, e.g., two age-friendly strategies published in 2010 and 2017 respectively, The Living Longer, Living Better: Housing for an Age-Friendly Manchester Strategy (2014), Alternative Age-friendly Handbook (2014), Living in Manchester: our age-friendly city (2016), etc (see full list in APPDENDIX I).

The publications released by the AFM team show constant efforts in involving older people in the process – a very strong communicative discourse in discursive institutionalist terms. For example, the two Age-friendly Manchester Strategy published in 2010 and 2017 (Age-friendly Manchester, 2017; Valuing Older People, 2009) (2 and 13 in APPDENDIX I) clearly lay down a concrete plan of how to make the city of Manchester more age-friendly. All three of the priority areas emphasize strong collaboration with not just older people, but also other partners and initiatives such as Transport for Greater Manchester, Older People 's Housing Alliance, University of Manchester, Lesbian, Gay, Bisexual and Transgender Foundation. Another good example is An Alternative Age-friendly Handbook published in 2014 (Handler, 2014)(See 10 In APPENDIX I). This is an interesting handbook providing a "playful and critical exploration of what creative urban practitioners can bring to emerging debates around the creation of Age-friendly Cities (Handler, 2014).

There are other publications involving academic research and the age-friendly related research projects. There were two major publications regarding the very first age-friendly project in Old Moat (See 11 and 12 in APPENDIX I). The Old Moat report documented the heavy involvement of older people in Old Moat in designing the action plan (Phillipson et al., 2013a). The corresponding toolkit recorded the participatory research method used in the Old Moat project to be shared with potential researchers in the future hoping to replicate the project in other places, or to do a follow-up evaluation in Old Moat ((Phillipson et al., 2013b). *Researching age-friendly communities* is a report of a similar but more enhanced form of participatory research done by Professor Tine Buffel in 2015 on the co-production and the co-creation of researching age-friendly communities (Buffel, 2015)(See 5 in APPENDIX I). Lastly, the *Manchester Age-friendly Neighbourhoods: State of the Project* was the publication introducing the Manchester Age-friendly Neighbourhoods Project in 2017 which is a continuation of the Old Moat project but executed in four other neighbourhoods in Manchester: Moston and New Moston, Miles Platting, Hulme and Moss Side, and Burnage (See 9 in APPENDIX I). It was a collection of case studies of different partnerships in these four neighbourhoods. There is a clear message in all these publications that they do not just focus on policy implementation (coordinative discourse), they also value how the age-friendly ideas can be passed down from top-down to the communities and at the same time feedbacked up to the policymakers (communicative discourse).

One important point to note is that older people are involved in the production of some if not all of these publications. In particular, there was one publication that received wide criticism initially but was later appreciated by the public. A guide, entitled The Over 50s, Relationships & Sexual Health, was initiated and produced by older people, and was published in 2014 (Cowell & Hughes, 2014) (See 8 in APPENDIX I). G, a member of the Older People's Board and Assembly recalled,

> *"We produced that sex guide for older people. …the broadsheets attacked it and said ... they spend money on bringing all this rubbish you know? But later on, everyone wants it, because not only that. If you look at it, it talks about all the different kinds of things, for example, transmissive disease, women health. And things that older people necessarily get the help… so it went further than the sex life…. So we were happy because of ...the publicity [it] gave us. hahahaha. It was negative it became positive after you see." [member of the Older People's Board and Assembly, G, interviewed on 30 December, 2019]*

Apart from publications that are useful in age-friendliness promotion, the AFM team also runs an array of programmes over the years. One example is AFM Cultural offer programme established in 2007, aiming at increasing older residents' access of Manchester world class arts and cultural facilities. In this programme, the AFM team works in partnership with over 19 cultural organizations from across Manchester – Royal Exchange Theatre, Hallé Orchestra, the Whitworth and People's History Museum, just to name a few, to encourage more older people to engage in arts and cultural activities. As an expansion of the programme, AFM started the Culture Champions Scheme in 2011, with the aim of "developing 'gatekeepers' in local communities to act as 'ambassadors' for the arts" (McGarry, 2018). Under this scheme, over 150 older residents from across the city are recruited to become culture champions. Their role is to contribute to projects, share their thoughts, knowledge and experience of the cultural activities and events with their friends, communities and networks (Buffel et al., n.d.; McGarry, 2018). They could initiate cultural or art projects through the cultural working group meeting under the Older People's Assembly. McGarry described this group of culture champions as "a powerful resource for mobilising older people and stimulating interest in the cultural offer" (McGarry, 2018). D, a member of the AFM team described one example of what the Culture Champions did,

> *"So one thing that the culture champions together decided, is that they wanted to learn how to be on radio. They wanted to learn how to be a radio host, they wanted to learn how to put a radio show together. They wanted to learn how to use the different buttons, microphone that kind of thing in a studio… And so they set up a radio show called "Vintage FM". … the Vintage FM is a result of the Culture Champion Programme. So the Vintage FM is fantastic now, because they currently do live broadcasts, at places like the conference. And then they also have a show, I think it's every Tuesday morning where they invite people to come and do interviews and that kind of thing…So it's again another example of direct responding to the voice and the needs and the desires of older people." [member of the AFM team, D, interviewed on 18 March, 2019]*

Besides, the participatory approach encouraged in the MAS is manifested in the active engagement of academics in the age-friendly development in Manchester, particularly in terms of designing the age-friendly strategies, exploring new ways of practices and evaluating age-friendliness in different neighbourhoods. It has been a common practice for the city of Manchester to carry out age-friendly research in different neighbourhoods across the city in

collaboration with research institutes and universities. The very first research done was the pilot study in Old Moat in 2012, commissioned by Southway Housing Trust, which will be discussed in further details in the next section. In this project, researcher had engaged older people in urban designs that makes Old Moat more age-friendly, through design workshops and focus groups. Furthermore, they published a research guide providing details of how to replicate research done in Old Moat in other areas. They were also planning a post-project evaluation whenever funding opportunities arise.

Following the Old Moat project, there are currently a number of research projects going on across the city, including Northern Gateway, Moston, Burnage, Miles Platting and Hulme and Moss Side. Scholars like Professor Tine Buffel and Professor Chris Phillipson have been engaging in participatory research projects on urban village and co-production, in which older people are actively involved as co-researchers based on the same age-friendly framework. Some academics even take part in the government in pushing forward age-friendliness not just at the city level, but also on regional level. Prominent figures such as Mark Hammond is currently on secondment with Greater Manchester Ageing Hub, while he is also a senior lecturer from Manchester School of Architecture. From all these examples, it is evident that academic involvement in the age-friendly development of the city of Manchester is significant and impactful. Their views and suggestions are greatly valued by the AFM and the City Council in carrying out the age-friendly development within the city, and eventually expanding that to the Greater Manchester Region.

This large-scale age-friendly programme of the Manchester City Council has been largely recognized not just nationally but also internationally. As a result, it has eventually been scaled up to the Greater Manchester region, which adopted the AFM approach. The Greater Manchester Combined Authority (GMCA) has launched the Age-friendly Greater Manchester (AFGM) programme in 2016, with more resources and partnerships, such as the Ambition for Ageing project funded by the Big Lottery Fund, the Ageing Hub, the Centre for Ageing Better and a number of different partners across the public and private sectors. The GMCA even invited Paul McGarry who initially led the AFM team, to be the Strategic Lead of AFGM. The GMCA published its first Greater Manchester age-friendly strategy 2017-2020 in 2018. Similar programmes like the Culture Champion Scheme, “Take a Seat” Campaign[9] originated from the Old Moat project, and

[9] “Take A Seat” Campaign is an idea borrowed from New York City and first implemented in the Old Moat project. It has since then been rolled out to other neighbourhoods in Manchester and Greater Manchester as part of the age-friendly development programme. More about the campaign is discussed in 5.3.3.

the Older People's Network were established in Greater Manchester as well. Older residents from the city of Manchester are also invited to get involved in Age-friendly Greater Manchester to share the good practices in different neighbourhoods. The Manchester City Council continues to work closely with the other 9 local authorities across Greater Manchester to design the age-friendly strategies together. The extent that Age-friendly Manchester is able to do in age-friendly development is widely recognized in the UK.

From all of the above examples one can see how influential the work done by AFM team is over the past 20 years since the launch of the VOP programme in 2003. Undoubtedly, the top-down force in the age-friendly development of the city of Manchester is indeed very significant, as shown in the achievement of the AFM programme. Despite that, interestingly, the Manchester case should not be seen as a zero-sum game – strong top-down means a weak bottom-up or vice versa. Instead, this case is a good demonstration of how the strong top-down narrative of age-friendliness can still potentially encourage and boost the widespread involvement of older people and neighbourhood groups in engaging with the entire city-wide or even region-wide age-friendly development process. This outcome is, I argue, largely the result of the contribution of the SLBs, which is the AFM team in this case, in promoting and ensuring an equal partnership of significant involvement from both top-down and bottom-up. Also, it is the reputation of the AFM in their age-friendly work that draws the attention of Southway Housing Trust, to begin developing age-friendliness in their own properties across South Manchester. The story of AFM that is happening at the city scale provides a background on how and why the Old Moat project started, and more importantly, shapes the development of Old Moat project, the Naturally Occurring Retirement Community, and the later development of age-friendliness in Old Moat. The Old Moat case study provides good insights on how age-friendliness can be enacted in the neighbourhoods.

5.3 The Case study: Old Moat and the Naturally Occurring Retirement Community (NORC)

The case study is set in Old Moat, a small neighbourhood in South Manchester, with only 1.8 km^2 of total area. This small pocket of land is mostly low-density houses, some of which are social housings that belong to Southway Housing Trust (Southway), a quasi-public housing provider and social enterprise in South Manchester (White & Hammond, 2018). According to Southway, Old Moat is a neighbourhood with a high proportion of older people living on low income or suffering from life limiting illnesses and having a lower life expectancy than the Manchester average (Southway Housing Trust, n.d.). Following the success of the city of Manchester in the city age-friendly program, this small neighbourhood of Old Moat equally caught not just local, national but also international attention due to the Old Moat age-friendly project

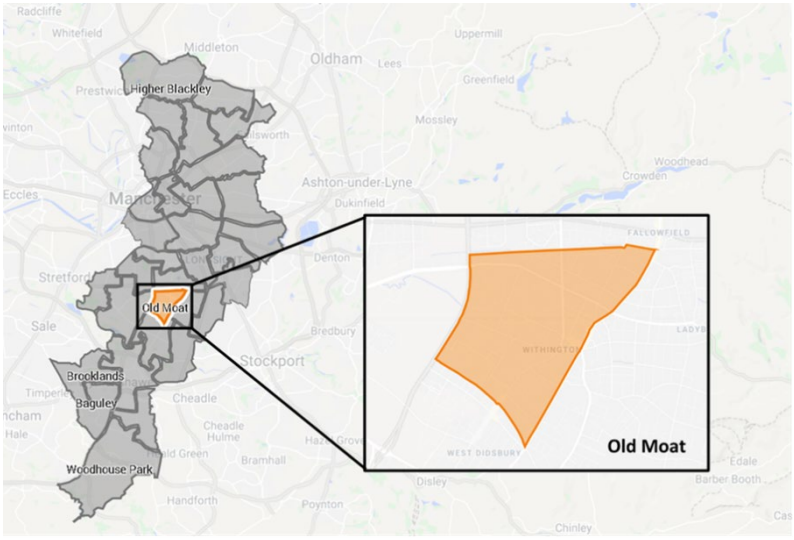

Fig. 5.2 Location of Old Moat in the city of Manchester

done in 2012, commissioned by Southway Housing Trust, in partnership with Manchester City Council Age-friendly Manchester Programme, and in collaboration with Manchester Metropolitan University School of Architecture and the Institute of Ageing Better (Community Development and Justice Standing Committee, 2014; Tatum, 2020). Old Moat and its Naturally Occurring Retirement Community (NORC) is significant in the age-friendly development in the city of Manchester in two ways. On one hand, it is the very first pilot study on age-friendliness on a neighbourhood level not just in the city of Manchester, but probably across the country. It aimed to provide a prototype on how to build an age-friendly community through partnerships of various parties, with older people at its core. On the other hand, the Old Moat case proves that while there is a prevalent strong top-down force from the Manchester City Council through the work of Age-friendly Manchester, the bottom-up approach as suggested by the WHO that involves active involvement of older people on the community level, is still plausible. In fact, Old Moat project was invited to the Older People's Assembly meeting several times to share how age-friendly research could be done on

neighbourhood level. For example, the Older People's Assembly meeting the researcher attended on 21 November, 2019, Cathy from Southway was there to share the Take a Seat Campaign in Old Moat, and how that was being rolled out to Chorlton area at the time. However, what is particularly interesting in the Old Moat case is that the findings show that the involvement of older people in age-friendly community affairs is not as active as described in the official discourse of Old Moat being an exemplary case of bottom-up approach. Why is it the case? What has changed or has not changed? These will be discussed in greater details in the following.

5.3.1 The Old Moat Age-friendly Project

The Old Moat Age-friendly project was commissioned by Southway Housing Trust, in partnership with the AFM programme of the Manchester City Council. Led by Manchester Institute for Collaborative Research on Ageing and the PHASE Place-Health Research Group at the Manchester School of Architecture, this project was part of a wider programme of work by groups collaborating with the local authority in alignment with the Manchester Ageing Strategy around the concept of ageing. It aimed to "address the environmental and social factors that contribute to active and healthy ageing in communities such as Old Moat in Manchester" (Phillipson et al., 2013a; White & Hammond, 2018). This project is a good demonstration of how age-friendliness can be materialized on a neighbourhood level, in particular, how older people could be involved in the process. It acted like a magnet that drew older people in the neighbourhood together, giving them a voice in building an age-friendly community for themselves. The Naturally Occurring Retirement Neighbourhood (NORC) social group in Old Moat is a by-product of the project that continues to bond the older residents together through organizing regular social events, peer support network and participating in the community. But who initiated it? Who were and still are involved in it? How does Old Moat look like after the project?

When Karen Mitchell became the CEO of Southway Housing Trust in 2007, she wanted to put more emphasis on community work, with a particular focus on ageing because around half of Southway tenants aged over 50 and are either frail, unemployed or live on low income. Southway sees age-friendliness as possibly a solution to the different issues faced by its older residents (Southway Housing Trust, n.d.) . So when Karen met Paul McGarry and Chris Phillipson in an age-friendly conference in Dublin, Ireland in 2011, she shared with them her idea of an age-friendly research project.

> *"It was the forward thinking of our Chief Executive Karen Mitchell who… was at a presentation in Ireland on age-friendly cities and made the links with Paul*

McGarry and the city council and worked up the idea of what can we do. So we've got the age-friendly city guidelines of what makes a city age-friendly. Well....what does that mean for people living in our neighbourhood … And that's where the idea for the research was born. It was a really exciting time that we had the investment and the drive from our board, and our chief executive to really want to try this and see what we could make, so we chose Old Moat as the pilot area. And Paul McGarry and the city council were heavily involved." [member of the Southway age-friendly team, O, interviewed on 17 May, 2019]

Old Moat was picked because it has one of the largest proportions of older population (around 43%) with a lower life expectancy than the city's average, as well as one of the most deprived areas among Southway properties (Phillipson et al., 2013a). There was never before a research project that systemically measures age-friendliness within a community across the city of Manchester. So the encounter in Dublin gave rise to the Old Moat project, which was done during May 2012 to January 2013 (Phillipson et al., 2013b). There were focus groups and co-design workshops arranged for local residents. To make sure that they involved older people throughout the process, even the action plan they came up with had gone through another round of workshop to collect older people's feedback.

"We then did a series of workshops where we presented that back to people involved in the project, and we got a couple of the priorities that they said 'well actually we don't think you quite got that right. You haven't talked about this. What about this idea here?' Kind of build from there. But in a lot of ways the action plan ended up having 140 something proposals there, which was the sum of the total of things that people were telling us. So we didn't exclude anything. We wanted to keep everything in there…" [researcher of the Old Moat project, P, interviewed on 25 March, 2019]

By the end of the project, apart from the research report and the action plan, the research team also produced the 122-page research and evaluation toolkit that provides a list of research methodologies and evaluation checklists as resources for both possible follow-up research in Old Moat, and future replication of research in other neighbourhoods. Developed from the result of the research study, there was also an action plan that listed out over 100 items to work on in Old Moat, covering six of the eight WHO domains, namely Outdoor spaces and buildings, Transportation, Housing, Respect and Social Inclusion, Social Participation and Communication

and Information (Phillipson et al., 2013a). Examples of the items are suggestions on improving the street design, improving quality public transport service, encouraging local participation and creating a communication plan bringing different stakeholders together. Although it was not stated clearly in the report, it is known through the interviews with the Southway Age-friendly neighbourhood team that they are mainly responsible for implementing the action plan. One of the most prominent actions done is the "Take A Seat" Campaign. The campaign was inspired by the Take a Seat campaign in New York City, and was later being rolled out across Greater Manchester. These practices contribute to a solid model of age-friendly neighbourhood for other neighbourhoods to follow. In fact, Southway did roll it out to other of its properties, as shown in their current project - Manchester Age Friendly Neighbourhoods (MAFN), which covers the neighbourhoods of Hulme and Moss Side, Burnage, Moston and Miles Platting (Hammond et al., 2017). This project is a wider partnership of not just Southway and Age-friendly Manchester, but also the Manchester School of Architecture at Manchester Metropolitan University, Manchester City Council, National Health Service (NHS), and is also part of the Greater Manchester Ambition for Ageing Programme (Hammond et al., 2017). With that said, there are a number of good elements in Old Moat with regard to developing age-friendliness on community level, such as advocating new ideas through co-design, constant involvement of the local community, and ways to sustain the connection made with the local residents after the project. This side of the Old Moat story is a more widely known narrative of age-friendly development in Manchester that has been extensively presented as the official discourse by Age-friendly Manchester. However, there is a more intriguing side of the story, a side that is relatively less known to the public, a "behind-the-scene" that is revealed from my field visits and through my participatory observations. That is not to say that the official discourse is not reflecting the reality, but perhaps part of the reality. It is this hidden part of the reality in Old Moat that adds up to the official discourse, revealing the real power dynamics behind the NORC of Old Moat.

5.3.2 The NORC after the Old Moat Project

NORC is known as the Naturally Occurring Retirement Community. It is a term coined by Hunt & Gunter-Hunt in North America in 1986. They define NORC as "housing developments that are not planned or designed for older people, but which over time come to house largely older people" (Hunt & Gunter-Hunt, 1986, p. 4). In contrast to a senior community that is purposefully designed for older people, a NORC is a senior community in which the residents in it "grow old" together naturally with the community. Residents in Old Moat moved into the community in the

1950s when social housing was built by Manchester City Council, and was later transferred to Southway, and have been staying there for decades, making it a senior community over the years.

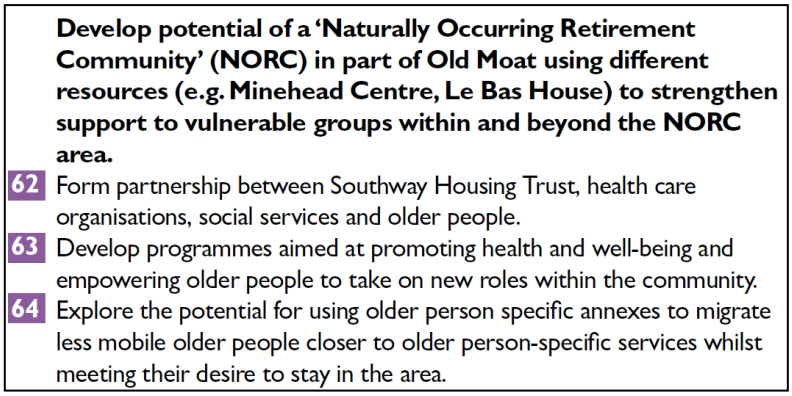

Fig. 5.3 Extract from Old Moat: Age-friendly Action Plan Overview showing the suggestion of setting up the NORC in Old Moat (2013)
Source:
https://hummedia.manchester.ac.uk/institutes/micra/ACTION%20PLAN%20MAP_11_04_14.pdf

Before going into details of the case study, it is important to define the street-level bureaucrats (SLB) in this case – the neighbourhood workers from Southway Housing Trust. As mentioned in Chapter 2, the definition of SLBs evolves over time. In recent decade, there are literature attempting to expand this definition – not only public actors can be SLBs, so can private actors. This is due to new modes of governance, i.e., the collaboration of both public and private sectors, implying that private actors gradually taking up more role in policy implementation (Knill, 2012; Sager et al., 2014). The term "bureaucrat" in this case does not refer to "employment in the public administration, but an actor's function as an implementing agent, i.e., his involvement in the (traditionally public) task of output delivery at the frontline" (Sager, et. al., 2014). In the case of Old Moat, the neighbourhood workers from the housing provider Southway Housing Trust are typical examples of private SLBs. As Southway is quasi-public organization, the neighbourhood workers from Southway cannot be considered public workers within the institutions under the Lipsky's definition of SLBs (Lipsky, 1969). Nevertheless they are actors who fulfill both public functions and take private actions. The nature of their job is to make the targeted communities more age-friendly, aligning with the age-friendly strategies that was laid down by the Manchester City Council. In that sense, they still fall into the category of SLBs under Sager's new definition of private actors involving in policy implementation (Sager et al., 2014). For instance, the SLBs from Southway were heavily involved in the research project in facilitating the focus group and other activities, and they have been staying in the community since then and helped with setting up the NORC and have been maintaining the group since then. Their role as SLBs in the NORC is crucial in shaping the nature and operation of the NORC. In fact, the SLBs and the NORC are both

indispensable to each other in age-friendly development process in Old Moat, which will be explained further in the following discussion.

Borrowing the idea of the NORC from North America, the NORC emerged as one of the recommendations in the Old Moat action plan, as a result of the Old Moat project, under the guidance and assistance of the neighbourhood workers from Southway Housing Trust (Phillipson et al., 2013a).

This community group, the NORC, was formed in around 2015, which currently had around 25 members at the time of fieldwork in 2019, most of which are living in Old Moat. From the account of Southway, it was initially a group of older people who were involved in the focus groups in which they expressed their views on what to improve in the community and designed collaboratively with the research team on the action plan. After the project, Southway saw the opportunity to invite the same group of older people to form the NORC (according to the action plan) and go from there:

> *"I think that's…. more through the NORC really because we spoke to older people about what they wanted and what they said was they wanted to have activities, just even as simple as a coffee morning. Those kind of local coffee morning where it meant that they didn't have to get on the bus. Somewhere they could walk to because I'm sure you will be aware of that. 500 meters move for older people. So, 500 m is kind of the radius… So we're probably talking about the older old now, people with mobility issues. That can really make it difficult if you got nothing within your area. So they have something local… there's a church called St. Christopher's Church which is here. So we do regular activities there. We do a bi-weekly coffee morning, so that's twice a month of coffee morning there. And once a month we do a larger event which is based around maybe information sharing that kind of thing for older people. And they've proved to be a really effective way of keeping people engaged, because as things are happening, as things are*

developing, we've got that cohort of people that we can talk to." [member of the Southway Age-friendly team, Y, interviewed on 4 March, 2019]

Fig. 5.4 A flyer from Southway showing the schedule of regular coffee morning of the NORC

"…when that [the NORC] first started, there was only about 6 members… and then we started ...trying to recruit other members, and then of course a lot came along by word of mouth. You say to your neighbour, and would you be interested in joining the coffee and... it's not happened all at once. Gradually, …I think we're up to about 25-26 members at the moment, which is quite good. But I'm hoping we would get several more, if they come along… the whole idea is to try to encourage people to be more friendly to one another, because a group of people can survive more than one person on their own, aren't they?... You know a group of people can come up with all sorts of ideas, ideas that sometimes are impossible, but at least come up with an idea. It works very well. It does." [member of the NORC, F, interviewed on 25 April, 2019]

As a strong bottom-up approach was suggested in the Old Moat project, older people involvement in the project had been quite active throughout the research process. However, the

situation was a bit different after the project. The bottom-up element was not as strong as it was during the project period. Basically, the NORC is established and managed by Southway, with the regular coffee mornings and monthly events all organized and held by the neighbourhood workers from the Southway Age-friendly team.

> *"They have the coffee morning every fortnight. But once a month, Southway puts on an event, but it's usually about 12:30 to 2:30pm or 1-3pm. They put a buffet on and there is always something, either a film show or somebody talking or music or something. It's very very good… Southway pays for the cost of the room, they supply the tea coffee and everything, and Jamie [the neighbourhood worker from Southway] comes along." [member of the NORC, A, interviewed on 25 April, 2019]*

During the time of the fieldwork, the NORC had already been into its third or fourth year. While the SLBs from Southway repeatedly explained that their role in the NORC is to ultimately make the NORC into a "standalone community action organization, that isn't reliant on agencies" [member of the Southway Age-friendly team, Y, interviews on 4 March, 2019], they still see the need to maintain certain level of control over the group, so as to protect them from being taken over by other social service organizations. The SLBs believed that most members of the NORC were not ready yet in organizing things themselves. The members did not feel confident enough to do things on their own, as the NORC had only been running for around 3 years at the time of the fieldwork. It takes time for the group to develop and mature. In this regard, Southway was very conscious about ways to train up older residents so that they could take charge of the NORC. For instance, responding to the request of one older member in the NORC, Southway set up the Peer Support Network, which was in the form of a series of workshops, providing training for members of the NORC, teaching them the skills of community organizing.

> *"…when we were talking to older people, one gentleman who is now 92, was 89 at the time said "This is great. Southway are great. But you know? I'd like to do things by myself. He said I'd really like to not always been waiting for somebody to organize something. He said I'd like a network that was run by older people for older people. So I said to him "That's to me sounds like you're describing a peer support network. And so we set about looking at what steps, what we need to do to create this network of older people… So we gave them 3 days of community organizing training…it was everything from how you would map up an area, how*

you would gather information, how you would engage people, how you would market anything what you're doing, how you would risk access, how you would get funding so it was a proper training course" [member of the Southway Age-friendly team, Y, interviewed on 4 March, 2019]

Following the trainings, some members were taking up a bigger role in organizing things for the NORC. They had also formed a committee after the group became a constitution group in 2016, in which there were the chairperson, the treasurer, and also an advisory team which were all comprised of members from the NORC. They would meet quarterly to discuss about things that they wanted to do. They have also got their own bank account set up, so that they could organize their own social events such as pub lunches or day trips.

"So we decided that we would pay every time we have a coffee morning, which is voluntary, if you don't want to do it, you don't do it. You pay a pound every week, it's marked down. We pay this pound and it's mounted up. I think we've got about £25 each in it. And we're going to have a trip out, and that would pay for it… They [Southway] gave us £500, but we have not used any of it yet…Yea It's just there if we need something." [member of the NORC, A, interviewed on 25 April, 2019]

At this point, the level of involvement of the NORC was limited to organizing social gatherings among themselves; in terms of operation, it was still the neighbourhood workers managing the group. The neighbourhood workers explained that it was because they did not feel safe to fade out when the NORC was not ready to be independent. One of the neighbourhood workers recalled an incident that happened in one of the usual events of the NORC:

"So a really good example is that I wasn't there when this happened, because I don't go along to all the activities anymore… another organization came in, didn't introduce themselves...because she was an older lady, somebody over 50s, assumed that she's come to join the group…Before the end of the session about 15 mins before…she suddenly gave out other people questionnaires, and asking for information." [member of the Southway Age-friendly team, Y, interviewed on 27 June, 2019]

It was this incident that made the SLBs from Southway quite cautious about whether they should fade out, or when they should fade out, at least now is not the right time yet.

"Well, they [the NORC] are doing that to a certain extent already. So things like the activities. They organize the trip, and monthly lunch. We have nothing to do with that. They do all of that themselves. So a lot of that is happening …what concerned me is if we retreat, what would happen is somebody else would come in and take over, because there's lots of organizations who want "ready-made groups". And so I think the danger would be that if we did just step away, someone else would just come in and want to fill that vacuum…So it's better for us to just keep the group actually…hopefully they will reach a point where they have all the confidence, won't be somebody else coming in... I think it's a question of we need to just make sure that they are totally confident before we completely walk away." [member of the Southway Age-friendly team, Y, spoken on one of the events in the NORC on 16 May, 2019]

For that reason, the NORC remains in the hands of Southway. In fact, the NORC needs Southway as much as Southway needs the NORC. Without the resources from Southway, it would be difficult for the NORC to maintain the current operation. On the other hand, other than just facilitating the needs of the NORC, Southway was also aware of how they could make use of what has been developed in Old Moat and replicate that into other areas. As mentioned above, Southway is expanding their age-friendly work in other areas such as Chorlton and Tameside. So the NORC in Old Moat is also a valuable resource in the form of social capital to Southway, in terms of sharing the experiences with other neighbourhoods. That was one of the ways to make older people from the NORC feel empowered and build up the confidence to do more. This is also a good reason for Southway to maintain certain control over the NORC, at least in the years ahead.

5.3.3 The Action plan after the Old Moat Project

While the NORC is just one of the by-products of the action plan, there are many other items in the plan that are yet to be achieved. While the NORC was still in its early development, it would not be plausible for them to take up the role of carrying out the action plan. Hence, it was Southway who took the lead in actualizing the action plan, and it is worth mentioning that there is limited involvement of older people (either from or not from the NORC) in implementing it. In addition to that, as mentioned previously, there are over 100 items in the action plan, it is quite a daunting task to do. There are also certain limitations that restrict the implementation of specific

items, e.g., the Minehead Centre that got burned down in 2014, was the centre of where the action plan evolved around.

> *"So I think the difference in this project [is that] it was ... not just a research project. It was actually … an action plan. And a full action plan about how to make an area more age-friendly. But things can take a long time to come to fruition…I think from the year that… the action research project was being held, there was a lot going on. And … it's continuous, you've got momentum, and everybody's on board. What happened is, as time goes by... someone else comes along that has to take precedence. Or people move on from that job, and the next person who comes in, their priorities might be different, so you've got this constant reframing, so it's not easy to keep that momentum going. So you happen to kind of like revisit things like that. So I think, this is certainly my assessment of it, but coming a little later on into the process, you could see that actually if it's not being driven all the time, and somebody not there pushing and doing things, it will just stop… It's got to be an organization, in this case, Southway, that's prepared to stay the distance, and keep it going.." [member of the Southway Age-friendly team, Y, interviewed on 4 March, 2019]*

> *"…a lot of findings in relation to the Minehead Community Centre which about 6 months, maybe a year after the program ended, was burned down. So instantly, you know, a fifth of our action plan becomes irrelevant because… you can't run something at a venue that was burned down." [researcher of the Old Moat project, P, interviewed on 25 March, 2019]*

Another example is the Take a Seat Campaign, which is also part of the action plan. On one hand, Southway claims that they will be updating the Take a Seat map every year, and to make sure they are able to maintain the number of seats available.

"The map we got at the moment, so we'll do regular updates. Every year doing update. Going around the shops that are involved. Ask them if they are happy, if they need a new chair, if they still have to be involved, and if anything changes, obviously, adjust it on the map, or approach another shop. The more shops that want to get involved, the better for us. And we will just add it in the map. We are doing it in Tameside and Chorlton as well. So it's not just an Old Moat thing, that's something that we're trying to do across everywhere." [member of the Southway Age-friendly team, B, interviewed on 1 May, 2019]

Fig. 5.5 Take a Seat Campaign poster with a map showing the locations of all the participating shops [Source: taken at field visit on 1 May, 2019]

On the other hand, when the researcher paid a visit to the area where the Take a Seat Campaign was held, i.e., the shopping area around Copson Street and Wimslow Road, which are on the east side of Old Moat, the researcher found that the map showing the locations of the shops was not up to date, because a few shops closed down, including Robinson Butchers on Wimslow Road, but it was still shown on the map. There was neither any new shops replacing the old ones that was shut down. One possible explanation may be that they are prioritizing the Take a Seat Campaign to Tameside and Chorlton area, that they could not make a timely update on Old Moat. Given the Southway age-friendly team is just a group of around 4 staff, it could be quite difficult for them to manage everything at the same time. And for the same reason, it might also be difficult for the team to initiate any other project in Old Moat, when they are doing a bigger project in other areas. For this same reason, older people were barely involved

in the later part of the action plan, except for the NORC that is still running up to this date.

5.4 Summary and findings

The age-friendly development has a strong and solid foundation from top down before the WHO even started the global age-friendly movement in 2007, resulting in a different scene in development from Hong Kong, as seen in a different pattern of interplay among the actors. Fig. 5.6 below shows the power relationship among the actors of the age-friendly development in Manchester. Similar to Fig 4.11 in the Hong Kong case, the arrows indicate normal and stable

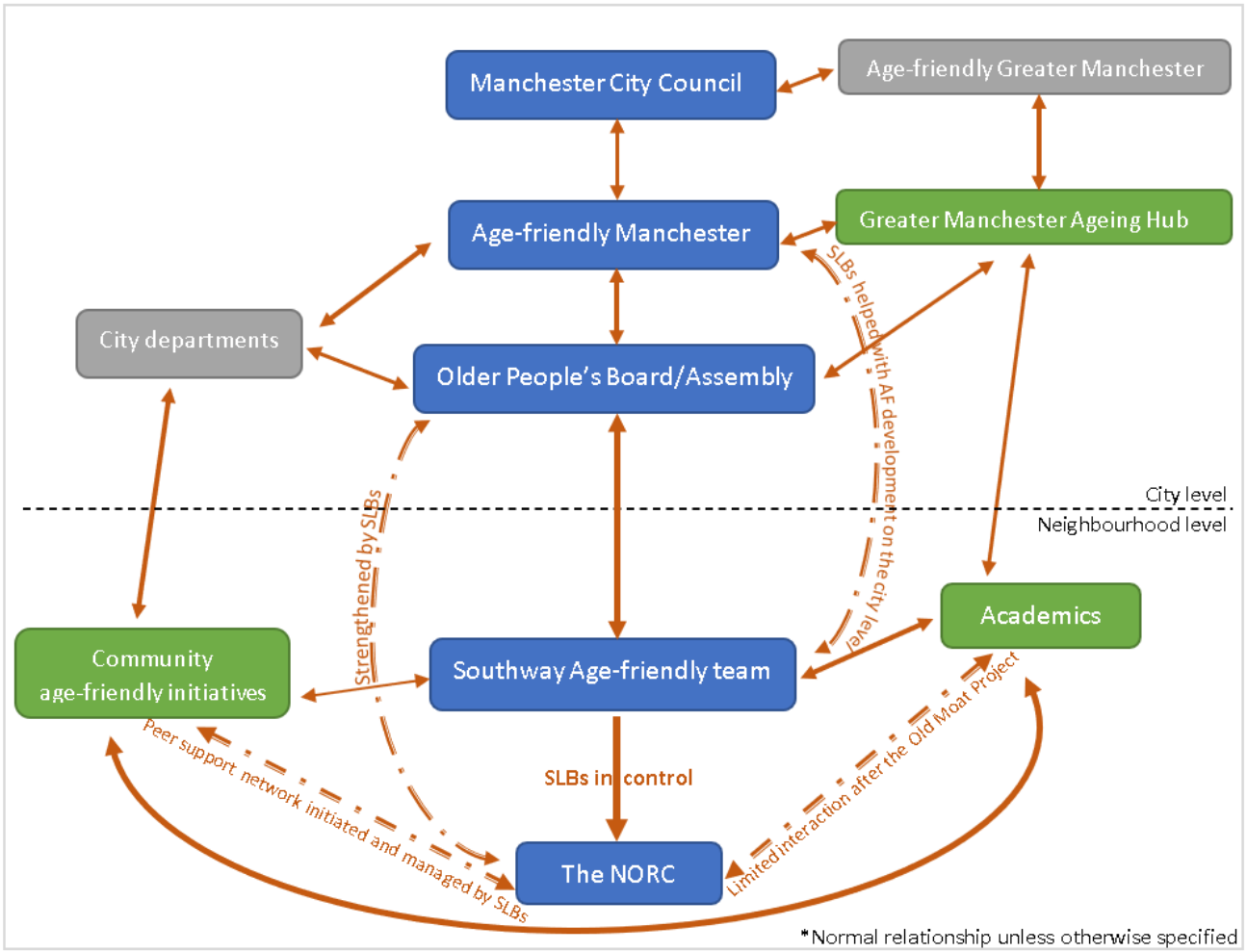

Fig. 5.6 Power Relationship in the process of age-friendly policymaking and implementation in Manchester

relationship and interaction between the two parties, unless otherwise specified, and annotated arrows suggest a change in the relationship between the actors, with the two SLBs at both city and neighbourhood levels influencing the interactions. The SLBs at the city level, the AFM team, connects all the different parties within the city of Manchester in amplifying the voices of older people, from improving bus services, to having a say in city development projects. And the

outcome is strong engagement of older people in city age-friendly affairs and development. At the neighbourhood level, particularly in Old Moat, older people involvement is not as active as the case at the city level. This could be explained by the nature of the NORC, as well as the fact that Southway Age-friendly team has more control over the NORC. The different behaviors and actions taken by the two SLBs can lead to different outcomes at different levels of governance.

Even though it may seem that the AFM programme and the Old Moat age-friendly process are not directly related, as they are developing age-friendliness at the city level and community level respectively, the age-friendly processes at the two levels have direct impact on each other. The two SLBs work closely together linking the age-friendly works at city and neighbourhood levels. This kind of connection is important in terms of how policy can be transferred from top to bottom and feedbacked from bottom to top. They are both aware of what is happening on both sides, and there has always been exchange and sharing of information among themselves, on occasions like the Older People's Assembly meetings, and Doing Ageing Differently - Greater Manchester Age Friendly Conference in 2019. The Old Moat project would not be able to come into being if the city of Manchester has not been putting age-friendliness as part of their major policy agenda. In turn, there would not have been the later projects done on a bigger scale covering multiple neighbourhoods across the city, with funding from the Ambition for Ageing Hub, which is a Greater Manchester level age-friendly programme, if there is no Old Moat project in the first place. This kind of reciprocity forms the Practice-Policy Communication Cycle, which will be discussed in greater detail in chapter 7. It is important to highlight that there are two types of SLBs at play at the city and community levels – the AFM team and the neighborhood workers from Southway respectively. At the city level, the major age-friendly player is no doubt the AFM from the Manchester City Council, which are defined here as SLBs at the city level. With the already very well-established Age-friendly Manchester Strategy, it is no doubt the age-friendly work at the city level is to a large extent being carried out closely along the three themes stated in the Strategy, which is tightly aligned with the WHO framework. Moreover, most members of the AFM team are experienced civil servants within the city council, so they are very familiar with the organization structure, policymaking and implementation. For example, O, member of the AFM team, has been working within the Manchester City Council since her undergraduate years (started as intern). Other members share similar background of work experience within the city government. With regards to age-friendly policy implementation, it is not surprised that they tend to follow the bottom-up approach as suggested both in the Manchester strategy as well as the WHO framework. Linking this back to the neo-institutionalist narrative, they are behaving, in

sociological institutionalist terms, in accordance with "social appropriateness" over efficiency. As the age-friendly strategy suggests that older people's voice should be the centre, they value older people's involvement over policy efficiency. In this sense, they have relatively less autonomy in steering the overall direction of the age-friendly policy, but they still have a certain level of discretionary power in designing the programmes. The outcome is reflected in theirage-friendly work at the city level, including a number of different programmes throughout the years, such as the Older People's Assembly/Board and Culture Champion programme. They emphasize the importance of the bottom-up approach, which constantly and consciously involve older people in their planning. They are the visionary in the global age-friendly movement, formulating their own age-friendly strategy ahead of most other places around the world. Most importantly, they cultivate a very supportive environment for neighbourhoods like Old Moat to experiment how to implement the city-wide age-friendly strategy in the communities. For the Old Moat case, the findings from both field observation and interviews show that the level of older people participation was not the same during and after the Old Moat project. As much as the Old Moat project promoted the importance of engaging older people in the process, older residents were not as actively engaged as suggested in the Old Moat action plan, which was the result of a number of reasons. Firstly, the nature of the NORC was more of a social group, compared with the Older People's Assembly at the city level. Older people in the group are more interested in social gathering than community organizing. Secondly, even though older people might be interested, it largely depends on the availability of resources Southway is putting into Old Moat. As discussed previously, the Southway Age-friendly team is a small team currently working on a number of projects in other areas across Manchester. In addition to the national rent cuts in recent years, there is very limited resources and manpower that could be allocated to Old Moat to sustain the level of older people participation at the community level. Hence, the years following the Old Moat project, the only things that are still in actual operation was probably the NORC. For the time being, that was the only way to keep the NORC alive, while Southway was exploring a number of external funding source to keep the age-friendly work going.

> *"…so Old Moat is always in the background, whenever new opportunities come, we could always bring it in and continue with the action plans, so it's never ...work has never stopped. But the action plan was so huge so many areas, it will never be finished, because there's so much to do but we continue to develop and deliver and work with local older people on new ideas and new funding streams, and new*

opportunities, new ideas. So it's always there. It's a live action plan." [member of the Southway Age-friendly team, O, interviewed on 17 May, 2019]

All in all, the Old Moat case shows very clearly that the role of SLBs is crucial in shaping how age-friendliness could be implemented. So during the research project, when Southway just started the age-friendly work in their properties, Old Moat was the only area that they were working on this, and they could invest 100% of their energy, time, manpower and resources into Old Moat. This explained why the Old Moat project was so successful not just in terms of the level of older people involvement, but also the scope of age-friendliness that the project managed to cover. However, there were changes to the situation, when the NORC was 3 to 4 years down the line, and when the SLBs moved on working on other projects. It was revealed from both the field observation and the interviews that the NORC remained as a social group as it was at the beginning. The lack of resources and manpower restricted the SLBs in delivering the same level of service to the NORC, and they were the ones who could decide how the NORC was to be operated, using their discretionary power. The fact that the NORC was not mature enough and members were not confident enough to run the group entirely on its own already has a clear implication that the nature and the operation of the NORC largely depends on the SLBs, at least at this stage. Going back to the official discourse of Old Moat that was mentioned at the very beginning, the findings in the case study does not simply imply that the official narrative is not accurate. Rather, it is suggesting that the official discourse only reveals part of the reality, which focuses on the good side of the Old Moat project, but not on the later development of the case. This further illustrates that age-friendly development is a rather dynamic process, and that any change of circumstances will impact the entire course of events.

The significance of the Manchester case is twofold. Firstly, being the very first pilot study on age-friendly neighbourhoods in Manchester, the outcome of the Old Moat project provides valuable insights into how age-friendliness can be enacted in the communities. The richness of the research report, assessment and evaluation framework, as well as the action plan developed out of the Old Moat project presents a good reference for other neighbourhoods within the city of Manchester to refer to in developing and shaping their own kind of age-friendliness. The Old Moat case represents a prototype of how the MAS at the city level could be incorporated and implemented at the neighbourhood level, which is useful in identifying the gaps in improving the AFM strategy. This kind of reciprocity at the different levels is essential to maturing the age-friendly development for a city as a whole. Secondly, the Old Moat case is a clear demonstration

of how SLBs are instrumental to the age-friendly development at the neighbourhood level. Since the NORC is still in transition at the time of the fieldwork, it relies heavily on the SLBs to further its development to potentially operate on its own. But before reaching that stage of maturity, the SLBs would still be in control of the group, determining how it operates and how it develops. Given the extensive work achieved by the SLBs, it is anticipated that more older people would be engaged with age-friendly affairs within the Old Moat community, when the opportunity arises.

5.5 Conclusion

This chapter looks into the case of Manchester in understanding how age-friendliness is being enacted and governed at both the city and the neighbourhood levels. The Old Moat case described meticulously the interplay of the different stakeholders within the neighbourhood, and how their interaction shaped the age-friendly development process within the Old Moat community. While it is not possible to generalize how age-friendliness can be enacted at the neighbourhood level based on only one single case, the Old Moat case study demonstrates the fluidity of the concept of age-friendliness, that it can be modified and redefined according to different circumstances. The Manchester case also illustrates the importance of the SLBs in shaping the age-friendly processes at both city and neighbourhood levels. These will be further discussed in the next chapter of comparing the cases of Hong Kong and Manchester.

CHAPTER 6
"WHAT GOOD AMID THESE?": LESSONS LEARNT FROM HONG KONG AND MANCHESTER IN THE AGE-FRIENDLY DEVELOPMENT

6.1 Introduction

In the previous two chapters, we have looked into how age-friendliness is being enacted in Hong Kong and Manchester respectively. The case studies of Tseung Kwan O and Old Moat demonstrate how differently age-friendliness could be played out in different local contexts under the same WHO age-friendly framework. A strong bottom-up force was shown in the form of the Tseung Kwan O Concern for Elderly Livelihood Association (The Association) in Hong Kong, with a nearly non-existent top-down age-friendly strategy at play. Whereas on the western front across the globe, the Manchester City Council showcases the Age-friendly Manchester that has been going on for nearly two decades. How similarly and differently are the processes being played out? And what does that tell us about building an age-friendly environment at the community level, as well as city wide? These are questions to be answered in this chapter through the comparison of the two cases. The purpose of comparison, according to Azarian (2011), is to "enable us to see the divergent formations of the phenomenon and ask why some have developed in similar ways while others is different ways". This type of comparison is also believed to be "referred to as variation finding comparisons, understood as studies that through comparing multiple forms of a single phenomenon seek to unearth systematic differences among instances and establish a principle of variation in the character or intensity of that phenomenon" (Azarian, 2011; Tilly, 1984, p. 116).

While the wider literature about age-friendliness is swirling around how to do age-friendliness right, be it around the WHO eight domains, or any methods of making communities more age-friendly, little had been discussed around what stakeholders are crucial in the process, particularly stakeholders at the community level, how they maneuver around the policy and negotiate with the upper level of administration to both have their voices heard, and to possibly bargain for more resources. This is the gap that this study hopes to fill in.

To begin with, let us look into the contexts of the two neighbourhoods in the case studies – Tseung Kwan O in Hong Kong and Old Moat in Manchester – before moving on to the comparison. First of all, the two neighbourhoods are of very contrasting urban landscape. Tseung Kwan O is a very densely populated neighbourhood filled with blocks after blocks of residential skyscrapers, while Old Moat is a very low-density residential area with mostly bungalows and semi-detached

houses. Also, Tseung Kwan O is more than five times the size of Old Moat. However, despite such differences, they do share some commonalities in their roles in the age-friendly development of the two cities. They are both few of the very first communities in their own cities in developing age-friendly communities. Both cases involve intermediary actors – defined in this thesis as SLBs – who play an important role in pushing forward the age-friendly development. The older people initiatives in both cases –the Tseung Kwan O Concern for Elderly Livelihood Association in Tseung Kwan O and the NORC in Old Moat – are one of the very few active neighbourhood initiatives that work for elderly in the region in both Hong Kong and Manchester respectively. Both are considered a good prototype for more initiatives of such to spring up as well as serve as good examples of how local initiatives can get involved in local age-friendly affairs and most importantly eliciting changes. Lastly, both cases have very similar sets of actors and their interactions help shape the age-friendly process, including top-down authorities such as the city councils, district councils, academics, funders like Southway Housing and Jockey Club, SLBs such as social workers, neighbourhood workers and the AFM team, local initiatives including the Association and the NORC, etc. These commonalities as contexts of the two cases are important elements that make the two cases comparable. What makes the two cases unique on their own are the way the actors interacted with each other and the actions and behaviors of certain actors (particularly the SLBs, academics and older people).

In the following, four specific themes are identified from the comparative analysis: 1) the adoption/adaptation of the WHO model; 2) governance; 3) the role of street-level bureaucrats (SLBs); and 4) the role of academics in the age-friendly development process. The discussion around the central theme of power and resources, i.e., Who gets more resources? Who has more say? Who holds more power and what kind of power? will be running through all of the themes.

Comparison	Types of power involved	Hong Kong	Manchester
1. Adoption/adaption of WHO framework	- policymaking power - interpretive power	- **Less WHO elements** throughout the process - Not clearly addressed in official government policy - Applied WHO 8 domains in the JCAFC project - Stakeholders from bottom up understand AF as lived experience - **Less experienced** in AF development (since 2008) - Outcome: almost non-existent age-friendly strategy	- **more WHO elements** embedded in both policy & research - combined 8 domains into 3 key areas into AFM strategy - **more experienced** in AF development (since 2003) - Outcome: clearly defined age-friendly top-down strategy
2. Governance	- Interpretive power - Implementing power - Communicative power	- **Strong bottom-up** elements Vs **weak** to almost non-existent **top-down** strategy - Almost non-existent AF policy on city level ➔ more autonomy for AF development in communities - Outcome: Different AF understanding and mentality on city and community levels	- **Strong bottom-up** elements with clear top-down strategy - Outcome: Consistent AF understanding and mentality on both city and community levels
Outcomes at different levels of governance		- City level: ✘ clear strategy nor a communicative platform for voices to be heard from bottom-up ➔ Outcome: ↓ older people participation → scattered and disorganized - Community level (Sai Kung): AF working group as a platform for local authorities to communicate with older people ➔ Outcome: ↑ older people participation	- City level: AFM as an effective communicative platform for older people to have a voice ➔ Outcome: ↑ older people participation → closely knitted and united - Community level (Old Moat): ✘ communicative platform like the AFWC in Sai Kung ➔ Outcome: ↓ older people participation
3. Type of SLBs	- Implementing power	- **One type of SLBs:** The social workers at the Complex, with social work background of either community development or elderly services - Nature: ➔ Advocate for and empower older people ➔ Connect top-down and bottom-up actors	➔ **Two types of SLBs:** ➔ City level: AFM ➔ Community Level: neighbourhood workers from Southway with background of working with elderly/nursing homes - Nature: see below

	- Implementing power - Discretionary power		City level: ➔ Let older people's voices be heard ➔ Connecting top-down and bottom-up actors	Community level: ➔ Maintain control over the NORC ➔ Relatively less encouraging on older people participation
4. Academics	- Narrative power - Implementing power - Interpretive power	- Diverse view of academics in their own involvement of AF development ➔ See themselves as educators that sow the seeds of knowledge and "train the trainers" ➔ Constant involvement Vs eventual point of retreat	- Believe in constant involvement of academics in AF development - Some have secondments in the local government in designing local AF policies - Support a collaborative approach, i.e. in the form of co-production, co-creation & co-research	

Table 6.1 Comparison between Hong Kong and Manchester

6.2 The adoption and adaptation of the WHO framework

One of the biggest impacts the WHO age-friendly framework and the Global Network brought about is the open platform it created for places around the world to share ideas and learn from each other. The standardized practice guide, with eight domains synthesized from data collected in 33 cities across the globe, not just launches new understanding into how age-friendliness can be achieved on national, regional and community levels, but also invites comparison between different places, and makes such comparison easier through a same standardized framework. WHO hence claims the universality of the guide, saying that "[it] is intended to provide a universal standard for an age-friendly city" (WHO, 2007b). In this regard, the presence of such a guide, just like any other policy guidelines, is very tempting for cities to fall into the trap of making it a "one-size-fits-all" policy, often with the underlying agenda of consolidating their own global city image. Despite how widely used the WHO framework is, there is in reality a number of different interpretations of the concept, which leads to a different approach in applying the framework. Given the different interpretations of the WHO framework between Hong Kong and Manchester, both cities adopted and also somehow adapted the WHO framework to an extent that fits their own regional policy agenda. This partly has to do with the different forms of sub-city governance of the two cities in respect of their national-regional relations. But the different attitudes and adoption/adaptation of the WHO framework by the two places definitely shed some lights on how exactly the WHO guideline could be interpreted and applied.

In terms of adopting the WHO framework, Manchester age-friendly strategy shows more serious efforts in incorporating the WHO elements than that of the Hong Kong one. Rather than merely applying the 8 domains into the framework, Manchester City Council combined the 8 domains into their 3 key priority areas. Whereas in Hong Kong, only the term age-friendliness was mentioned in the Policy Address, not even the 8 domains were anywhere mentioned. In this sense, the Hong Kong city government left the interpretive power of age-friendliness to those actors on the community level, whereas the Manchester city council centralized their interpretive power in deciding the overall direction of the age-friendly development. The difference in the interpretations and adoptions of the WHO framework of the two cities is due to a number of reasons in relation to power and resources. First, it is the state-regional political and economic relationship that possibly influences how both cities shape their own image. For Hong Kong, it is an autonomous region that has its own political, judicial, economic and social systems separate

from mainland Chinese systems. Financially, it does not rely on the Chinese government for resources. Additionally, its colonial history earned the city an advantage of being an international financial district at the southern tip of China. The "one country two systems" policy makes Hong Kong a Special Administrative region which is very different from any other cities in China in terms of its economy, governance, and socio-cultural environments. This uniqueness gave Hong Kong the autonomy to develop its own policies. Since age-friendliness is not the top priority in its political agenda, the city government has been quite ambivalent in putting age-friendliness as one of the city major strategies. This weak top-down element in Hong Kong's age-friendly development results in a rather liberal environment for other actors to develop and interpret age-friendliness on their own. The Jockey Club Age-friendly City (JCAFC) Project and the story of Sai Kung District Council are some of many examples of local efforts in defining and materializing age-friendliness on community level. The city government of Hong Kong, although half-hearted, is still liberal and supportive in this kind of work on the ground, as shown by the lump sum of HK50,000 allocated to each district council for getting the WHO recognition, which requires members to a) share and promote the values and principles laid down by the WHO age-friendly framework; b) commit to and implement the four steps to create age-friendly local environments; and c) actively participate in the Global Network for Age-friendly Cities and Communities (World Health Organization, 2019). But apart from just getting the WHO branding, how do people in Hong Kong interpret age-friendliness and the WHO framework? There have not been very strong WHO elements on both city and community levels. Only the JCAFC project applied the 8 domains into the baseline assessment and followed the Vancouver protocol in designing the survey questions. Contrastingly in Sai Kung district, while there has been so much going on within the district, particularly work done by the Association and the Complex, little was mentioned of the WHO framework nor the 8 domains. Older people and local community hold the interpretive power in determining what it means to be age-friendly and how age-friendliness can be manifested within their own community, just like what the social worker from the Complex interpreted:

> *"At that time, we didn't call it age-friendliness, or elderly-friendly, but when we look back at its meaning, it's the same thing… And then we realize that applying WHO 8 domains, easier to apply for funding. It's the same thing we think! But it's easier to apply for funding." [Social worker of the Complex, L, interviewed on December 13, 2018]*

From this, one can see that people in Sai Kung have their own way of making their communities age-friendly, with or without the WHO model, as if it is a complementary element incorporated in the existing local age-friendly work. To them, age-friendliness is about the lived experiences of older people rather than a universal guideline.

Whereas in the city of Manchester, the city council relies heavily on the national government as one of their major sources of revenue other than council tax. For example, in the fiscal year of 2019/20, the city of Manchester received £777.4 million from government grants and contributions, compared to the £161.5 million from council tax (Manchester City Council, 2020). However, it is unclear though how much of that was allocated to Age-friendly Manchester and age-friendly related work. Together with the national budget cuts since 2010 that also affect regional governments, the city of Manchester has been facing more challenging fiscal crisis in governance as a result of this austerity. Therefore it is necessary for the AFM to look for other sources of funding to develop their own programme. In fact, AFM has been proactive in capturing more resources for the programme to keep running, such as how Age-friendly Manchester has been scaled up to Age-friendly Greater Manchester and the Ambition for Ageing programme which was funded by the National Lottery Community Fund. The difference in the national-regional relationship in the two places can help explain the different political position of the two city governments in supporting the age-friendly development within their own territories, resulting in the variations of the top-down bottom-up dynamics, which will be discussed in more details in the later section.

The presence of a clear top-down AF strategy implies that the city of Manchester holds the interpretive power in defining what age-friendliness means and how it should be implemented in the city. They even set up a specific team, the AFM team, to carry out age-friendly strategy on the city level, of which such body is absent in Hong Kong. Manchester AF Strategy has also incorporated a lot more of the elements from the WHO framework into their age-friendly strategy than Hong Kong: they adopted the WHO model in designing the baseline assessment across a number of its areas; they also adapted the WHO framework in their own age-friendly strategy through combining the 8 domains into 3 key areas, which they believe would not only be easier to understand and remember, but also fits better into the Manchester context, e.g., they renamed their Valuing Older People's Programme into Age-friendly Manchester in 2010. They also make good use of the WHO global network as a platform to learn from other cities. For example, they took the idea of the Take a Seat Campaign from New York, and the concept of Naturally Occurring

Retirement Community (NORC) from North America, and experimented with both ideas in the Old Moat pilot project, and later on, rolled that out in other neighbourhoods. With all these good practices that the city of Manchester has, the AFM team is aware that the WHO model or even the idea of age-friendliness is not rigid but forever evolving. It needs to be continuously modified and updated according to the needs of older people at different times:

> *"…because I'm responding to what older people are telling me and us as a program, and that could be very different next year than it was last year... And for some people I think the fact it's ever-changing might be a bit scary because they might...because we are always working towards being an age-friendly city. Right now, Manchester is not an age-friendly city… and I don't think it ever will be, because what we mean by an age-friendly city is always changing, because what older people want is always changing." [member of the Age-friendly Manchester Team, D, interviewed on March 18, 2019]*

As evident in the above discussion, there are more WHO elements embedded in both their existing AF policies and research in the city of Manchester than in Hong Kong. They are also more experienced than Hong Kong in terms of the AF development as they started it 4 years earlier than the 2007 WHO age-friendly movement, while Hong Kong only started it in 2008. The different attitudes of Hong Kong and Manchester in adopting and adapting the WHO framework clearly explain that even though the WHO model is a universal guide on creating age-friendly communities, different places have their own agenda in positioning themselves in the global age-friendly movement, varied based on the ultimate goal of achieving different political ends, leading to quite different outcomes. This is not to compare which city is doing better than the other one, it is rather the choice made by the two city governments that imply which level of governance is holding the interpretive power, leading to different outcomes, which will be discussed further in the next part.

So overall there are two major arguments here. First, the WHO framework should not be seen as a "one-size-fits-all" guide. To argue that the WHO model should not be seen as a universal guide is not trying to downplay the usefulness of the guide. Since the year of 2007 when the WHO guide was published, there were a number of updates and additional documents released in enriching the guide through providing a guide to using core indicators in measuring age-friendliness, an update on the current situation of the Global Network for Age-friendly Cities and Communities, an updated version of the global network membership guide, etc. WHO shows

continuing efforts in advancing the global age-friendly movement to another stage. There is no doubt that the WHO framework has its own value in actualizing age-friendliness on the ground. What one should notice is not exactly about how useful the guide is, but how to put it into good use. So not seeing it as a golden rule of age-friendliness is the first key, and the more important agenda is rather how to apply the WHO framework into local age-friendly policymaking and implementation. Secondly, the understanding of the kind of interpretive power the top-down players hold at the city level influences how age-friendliness could be played out on the ground. The two case studies show the different attitudes of the two city governments in designing their age-friendly strategy: Manchester City Council clenched the interpretive power to define what age-friendliness means in Manchester, while Hong Kong city government is reluctant to do so and gave the power to the districts to give their own definition. Such power dynamic at the city level has implications on the implementation of age-friendliness at the community level, which will be discussed in the next part.

6.3 Age-friendly development at different levels of governance

In traditional planning theory, the top-down and bottom-up approaches are mainly used in policy implementation analysis (Sabatier, 1986). The top-down bottom-up perspective provides a lens of understanding age-friendly processes at two different levels: the policy and practical level. On one hand this lens is very useful in examining the relationship and interaction between the processes happening at both city and neighbourhood levels. On the other hand, it also oversimplifies the different stakeholders involved in the age-friendly process. The argument here is to identify the intermediary stakeholder that can bridge the top-down and bottom-up actors.

This study borrowed the notions of top-down and bottom-up into its own analysis of the interplay of actors in explaining the process of age-friendly implementation. The theoretical dichotomy of top-down and bottom-up creates a boundary between different administrative levels, with top-down being the city level of governance, and bottom-up the community/district level. First and foremost, even though the top-down and bottom-up theory seems to suggest that the power dynamics within a policy implementation process to be a zero-sum game as in the form of the top-down bottom-up dichotomy (Sabatier, 1986), the case studies show quite a different scene. The power dynamics and interplay of stakeholders in the process is more complex than merely top-down and bottom-up. The purpose of putting the top-down vs bottom-up rhetoric into discussion is to create a new discourse of understanding age-friendliness and age-friendly implementation – the focus is on the actors, particularly actors at the community level, rather

than the approaches of age-friendliness. So what actors are involved and how did they interact with each other in shaping the age-friendly development in a particular place, under place-specific contexts? In the two cases, it is shown that despite not seeing the entire process as a zero-sum game as suggested above, it is evident that the top-down and bottom-up work simultaneously on different levels: the top-down force is predominant in determining the overall nature of the age-friendly process on a wider scale, i.e., regional/city level; while the bottom-up force is crucial in actually shaping age-friendliness on community level. There are also other stakeholders outside of this top-down bottom-up framework, such as the role of street-level bureaucrats and academics, which will be discussed in greater details in the next sections.

Although there is no actual power struggle between different levels of governances in determining how age-friendliness can be practiced and played out on the city and neighbourhood levels, there is very subtle power dynamic going on between top-down and bottom-up actors that explains how and why age-friendliness is being implemented in certain ways. Continuing the discussion in the previous section on how different the two city governments in terms of interpreting and adopting age-friendliness and the WHO framework, this section will be examining how policymaking and resources allocation shape the nature of the age-friendly development on the ground. The contrast between the two city governments, as shown in the clear top-down strategy in Manchester, as compared with the weak to almost non-existent top-down strategy in Hong Kong, leads to quite different outcomes on both city and community levels.

The meanings of the cases of Manchester and Hong Kong are three-fold. First, the case studies show that the presence (absence) of top-down and bottom-up stakeholders are influential to each other in both the interpretation and actualization of age-friendliness on different levels of administration. While both Manchester and Hong Kong show strong bottom-up elements in the age-friendly development process, the bottom-up engagement occurs at different level of governances in the two places: at the city level in Manchester and at the community level in Hong Kong respectively. The level of governances where resources are allocated at suggests where bottom-up engagement is at. As suggested in the previous section, Manchester City Council has the interpretive power and developed a clear top-down age-friendly strategy, together with the establishment of the AFM team, as well as the Older People's Board. A very clear direction of encouraging bottom-up engagement is central to the AFM strategy. Resources being centralized at the city level nurtures strong interaction between the Manchester city council (top-down) and older residents of the city (bottom-up) facilitated by Age-friendly Manchester and the Older

People's Board/Assembly and this explains why the public engagement is the most active at the city level. On the other hand, at the neighbourhood level, scattered resources could be seen in individual projects that are neighbourhood specific, such as the Old Moat project, and later the Manchester Age-friendly Neighourhood project. In Old Moat, Southway Housing is the major funder of the age-friendly work within the community. Yet, as they have been expanding their work to other neighbourhoods, there is limited resources to further the age-friendly work in Old Moat. As a result, the NORC in Old Moat is more of the nature of a closed social group, with the age-friendly neighbourhood workers from Southway basically leading the community age-friendly development, rather than older people taking the initiatives. The lack of a local authority involving in the age-friendly development in the neighbourhood, a role that might be similar to the role of the district council in Hong Kong, results in a different approach of age-friendly manifestation in Old Moat which varies from what is happening at the city level. Whereas in Hong Kong, the nearly absent age-friendly strategy of the city government discourages older people engagement at the city level, but cultivates a liberal environment for open interpretation of how to create an age-friendly community at the neighbourhood level. Resources, rather than centralized at the city level, are allocated to districts, allowing more autonomy for district councils and local communities to develop age-friendliness in their own ways, and also encouraging older people's involvement in the community. In the case study of Sai Kung, older people from the Association in Tseung Kwan O might have had to face a lot of red tapes if there was a clear age-friendly guideline imposed from top down at the very beginning. However, we might yet to see if such bottom-up efforts could further extend the influence to a wider geographical context, i.e. community level of age-friendliness leading to the emergence of a city-wide age-friendly strategy in the future.

Secondly, the levels of exchange and interaction between different stakeholders at different levels of governance, which can be determined by the presence or absence of a communicative platform allowing certain level of exchange to occur, can lead to very different outcomes. Such communication platform is again related to how resources are allocated, whether at the city level, or more at the community level. The cases of Manchester and Hong Kong show almost the exact opposite in terms of the presence/absence of the communicative platforms on different levels. In Hong Kong, the presence of age-friendly working group within the district council provides an important communicative platform for older residents to voice out their needs and negotiate with district councilors, and local authorities to intervene in community affairs. Likewise, the presence of the Older People's Board/Assembly provides an important channel for older people to voice out their needs to the Manchester city council, that would respond to their

needs through the work of Age-friendly Manchester. On the contrary, despite having city councilors assigned to specific wards in the city of Manchester, the lack of a communicative platform at the neighbourhood level (which can be similar to the DCs in Hong Kong) makes it harder for older people to express their opinions specifically on local matters. Similarly, there is no such platform in Hong Kong at the city level, which somewhat creates a barrier for older residents to participate in any form of age-friendly policymaking on a city scale.

Thirdly, the case studies also suggest one to go beyond the top-down and bottom-up dichotomy and to pay attention rather to the stakeholders who are outside this theoretical dichotomy and are equally crucial in shaping the age-friendly development on different levels of governance. In both Manchester and Hong Kong, there are a number of other stakeholders throughout the process, who are neither identified as top-down nor bottom-up, including the street-level bureaucrats, academics, non-governmental organizations, housing providers, charities, cultural groups, and private sector. In particular, the roles of street-level bureaucrats and academics are paramount in shaping the nature of age-friendly development in various contexts. The presence, engagement and interaction of these other actors shows intricately how such collaborative approach is possible and probably desirable in the age-friendly development on different levels of governance.

All in all, there are three findings revealed in the two case studies under this top-down bottom-up framework: 1) the nature of the top-down and bottom-up forces in the age-friendly development on different levels of governance influence one another and together shape the age-friendly development into different forms of representation and manifestation; 2) the presence/absence of a communicative platform affects the form of communication between top-down and bottom-up stakeholders, which in turn largely determines the nature of age-friendliness on different levels of governance; 3) the existence and engagement of other stakeholders outside the top-down bottom-up dichotomy are equally important to the age-friendly development process.

6.4 The role of street-level bureaucrats in the age-friendly development process

This section is a continuation of the discussion about the top-down bottom-up rhetoric as mentioned above. The argument about top-down and bottom-up stakeholders in the age-friendly development does not necessarily imply that all stakeholders can be categorized only into either

top-down or bottom-up, in fact there is one stakeholder that is often being neglected but I argue to be crucial in the age-friendly development process: street-level bureaucrats (SLBs). Their role is being underestimated in the age-friendly process because they are not as big as the policymakers who have the absolute power to design overall policy, but they are neither the target policy recipients whose needs are to be taken into account in policy design. SLBs are, as previously defined, the "public service workers who interact directly with citizens in the course of their jobs, and who have substantial discretion in the execution of their work" (Lipsky, 2010, p. 3). Hence, they are neither top-down nor bottom-up, but rather those in the middle, in between top-down and bottom-up. It is exactly this unique status of the SLBs which makes them so important in the age-friendly development process, since they are the ones who connect the top-down and bottom-up stakeholders. The ambiguous status of the SLBs lies on the nature that they are part of the institution (which may also be from the private sector in recent decades, as suggested by Knill & Tosun (2012) and Sager, et.al. (2014), yet not necessarily needing to uphold the same political visions as much as the top-down stakeholders, nor to agree to the demands of the everyday people. Their in-between-ness gives them the flexibility and freedom to maneuver between the expectation from the top-down and the needs of the bottom-up, choosing whichever that is in favor of their own interests and preferences. This is what Lipsky described as "discretionary power". Such discretionary power, as shown in the two case studies, is argued to be the major determinant of shaping the nature of the age-friendly development in both places. The case studies exhibit three distinctive styles of the SLBs, which do not exactly fit into the negative connotations of Lipsky about how street-level bureaucrats use the "discretionary power" to advance their own interests only. In fact, the research findings show that the SLBs act more like "good guys", according to Hill's account of the negative and positive perspectives on the role of street-level bureaucrats (Hill, 2009), as discussed in Chapter 3. They are the ones who "adapt rules to real needs", "are sensitive to the needs of the public they serve" and "use whatever decision they have to advance service ideals" (Hill, 2009). In the following, I shall explain how these

qualities are seen in the three types of SLBs revealed in the two case studies and explain why the SLBs are the significant ones who largely shape the nature of the age-friendly development.

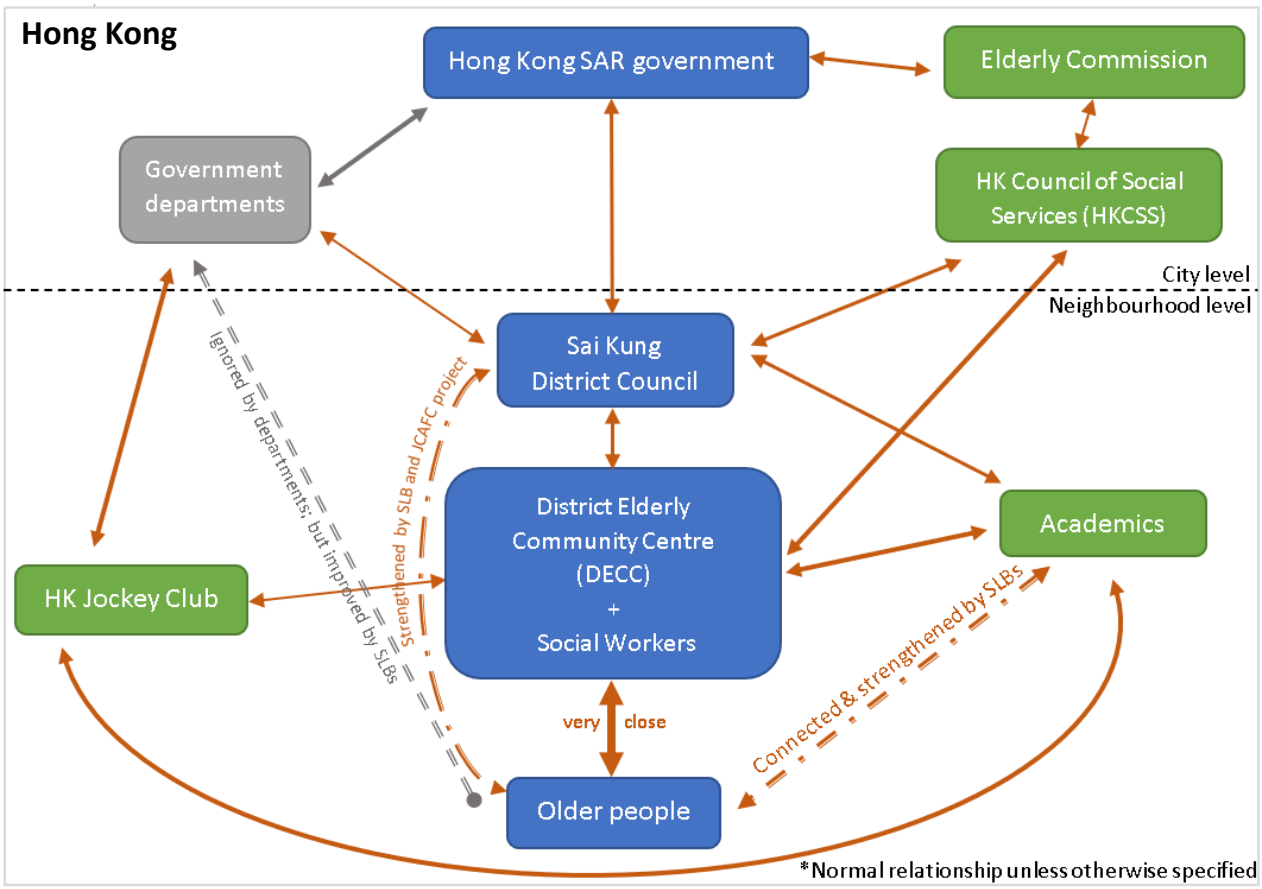

Fig. 6.1 Power relationship in the age-friendly development in Hong Kong (same as Fig. 4.11)

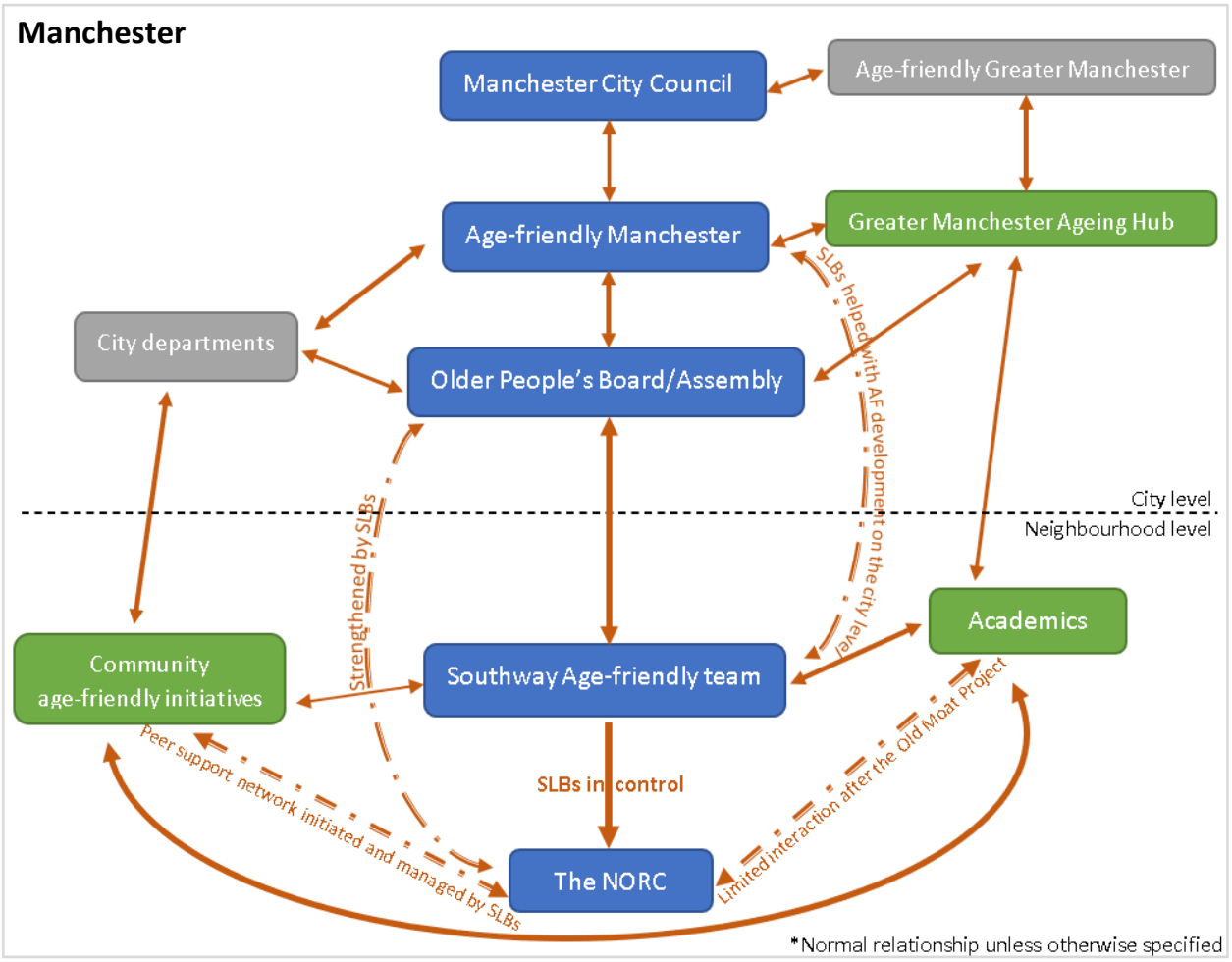

Fig. 6.2 Power relationship in the age-friendly development in Manchester (same as Fig.5.6)

Although the types of SLBs found in the two cases are slightly different, they both share one commonality: all SLBs in the two cases have the implementing power to determine how age-friendliness can be played out and how older people can be involved. The difference in the two case studies in terms of SLBs' behaviours and action has much to do with again the power and resources allocation. The lack of centralized power and resources in age-friendly development at the city level in Hong Kong allows more freedom and implementing power from bottom-up. In the case study of Sai Kung, the SLBs who are the social workers from the Complex, have more implementing power to develop age-friendliness through working really closely with the older members of the Association to negotiate with the district council to discuss on community matters. As discussed in the Hong Kong chapter these SLBs believe in equal partnership with older people and insisted that it should be older people taking the initiative to raise issues to be discussed. And the SLBs make use of the networks that they have with different parties to advance the agenda of older people. In the Duckling Hill incident, they partnered with Polytechnic University of Hong Kong and a design lab to map out a design blueprint of the facilities on Duckling

Hill together with older hikers, and later on presented it to the district council for approval. This liaison work by the SLBs is crucial in empowering older people and effectively make their voices heard. Another reason for such actions taken by the SLBs might probably be explained by the nature of their job. Employed by the Sheng Kung Hui Welfare Council, the major duty of these social workers is to provide elderly services to older members of the Complex, with managing the Association and the community age-friendly work being just part of their work. In that sense, they will not be out of jobs even if they give more power to older people and let them take the lead. This same reason might also partly explain why the neighbourhood workers from Southway acted differently in their work with the NORC in Old Moat, which I will get back to in the later discussion.

There are two types of SLBs in the case study of Manchester, with one at the city level and the other one at the community level. The community level type of SLBs are the neighbourhood workers from Southway, who were originally hired to take care of the Old Moat neighbourhood when they first started the Old Moat project. The other part of their job is to liaise with Age-friendly Manchester team, and figure out how they could implement the idea back to their neighbourhoods,

> *"I was employed by Southway but my job was broken into two, and part of my time was spent within the Valuing Older People Team, which is now the Age-friendly Team in Manchester. And I was the conduit of looking at all those opportunities in the city or the thinking in the city, and how we can bring that down into a neighbourhood, and that was my role that linked them too, whilst..... delivering the project and working alongside the research of the project" [staff from the Southway Age-friendly team, O, interviewed on May 17, 2019]*

From this, one can see clearly how the SLBs are making good use of their available resources and network to connect with other stakeholders at the city level, i.e. Age-friendly Manchester team. The act of bringing down any ideas or strategies laid down from the city level to the community level is exactly how policy can be transferred down onto the ground, and potentially feeding back up to the city level. That explains why the SLBs are so important in the age-friendly development in the way they bridge the top-down and the bottom-up. And very interestingly, the nature of how age-friendliness has been materialized in Old Moat is not very much the same as what has been going on in the neighbourhood of Tseung Kwan O, Hong Kong. This, I argue, to be largely due to the way the SLBs in Old Moat manage the NORC. As seen in the Old Moat case study discussed in the previous chapter, the NORC is more like a closed social

group, with regular coffee mornings and monthly social events organized and managed by the SLBs from Southway. So why are members of the NORC not like members of the Association that participate actively in community affairs? One reason is the absence of a communicative channel at the community level, as previously mentioned, the other reason is probably to suit the agenda of the SLBs from Southway, particularly with the limited resources available. As said in the previous chapter, Southway has been collaborating with Age-friendly Manchester team in rolling out the Old Moat prototype to other neighbourhoods. They created the Peer Support Network, with members of the NORC sharing their experiences with residents from other neighbourhoods. That said, there is a need for Southway to maintain certain control over the NORC, in order to make it easier for them to manage their current projects, particularly in terms of promoting the Old Moat age-friendly model, in sharing the Old Moat experience, and telling the Old Moat story through the voices of the NORC. The NORC and Old Moat have become part of their narrative of the "Southway-kind-of age-friendliness", with Old Moat being where "age-friendliness has started", and even become an extended discourse of "doing age-friendliness in the Manchester way". And the fact that the NORC is a bottom-up initiative makes it very risky for Southway to retreat from the group, as other organizations might just jump in and take over this "ready-made" group, as suggested by Y in the interview. So however the SLBs might want to fade out, they are aware that the NORC is still pretty significant to them in promoting the work they are doing, so they simply could not easily let go of the group. And it might be safer for the group to remain a social group so that it is easier for the SLBs to manage and allow them more time and resources to focus on the current projects in other neighbourhoods. Of course, this is also partly due to the fact that members of the NORC show little intention in actively participating in community affairs that they are just happy to maintain the group as it is now. N, a member of the NORC and also a member of the Older People's Assembly, has been quite actively involving in the age-friendly work outside of the NORC. She joins and volunteers in a number of other groups in nearby neighbourhoods including the Didsbury Good Neighbours, Health Walk Group, St. Vincent de Paul Society, etc. The way N participates in the community suggests that older people will seek ways to stay active. In this case, if the NORC is not the place for discussing community affairs or eliciting community changes, N would look for other ways to do it, such as joining the Older People's Assembly. The complexity of this tangle of relations between different stakeholders pretty much explains why the NORC is quite different in nature from the Association in the Sai Kung case study, and shows how differently the way the SLBs work and use their discretionary power will result in a very different outcome.

The third type of SLBs is the staff from the Age-friendly Manchester team, who are the typical type of SLBs Lipsky suggested: being part of the institution and work closely with people on the ground. They are the ones who in theory carry out the policies laid out in the city's age-friendly strategy. But as SLBs, of course, they have their own way of actual policy implementation. In this case, the SLBs from the Age-friendly Manchester are "good guys", who do the best they can to serve older people. And as an official body affiliated with Age-friendly Manchester, the presence of the Older People's Board/Assembly is the best communicative platform for older people across the city to channel their thoughts and ideas to the city council. The SLBs from Age-friendly Manchester respect and listen to the needs of older people and take them really seriously into developing various programmes at the city level. Members of the Older People's Board/Assembly has the power to raise issues to the agenda for discussions, to decide on what programmes/activities they would like to develop, and to give feedback to policy plans developed by various departments. The SLBs are there to facilitate their discussion, actualize their needs into action plans and co-design programmes with older people. Contrary to the NORC in Old Moat, Older People's Board/Assembly provides the opportunities for older people to be active in making changes in their communities, and exchange ideas with each other through the assembly meetings. Despite the huge budget cuts in recent years, the SLBs of Age-friendly Manchester have been trying their best in delivering their service and upholding their belief of "putting the voice of older people at the centre of the programme". They are the key stakeholders determining the nature of age-friendly development at the city level. Despite the very strong top-down elements in the form of a well-developed age-friendly strategy for the city, the SLBs did balance out the power dynamics by empowering older people putting their voice into the service delivery, so that the bottom-up element is as strong as top-down one in the age-friendly development process of the city of Manchester.

6.5 The possible role of academics in the age-friendly development process

As the central argument of this thesis is around how the whole process of age-friendly development is being played out and the previous discussion has been around the key role of the entire process being street-level bureaucrats, it is also worth mentioning another interesting actor that could be significant, but appear to be marginal throughout the process: academics. They are usually not directly involved in the policy implementation process because they are neither the policymakers, nor the policy recipients, nor the ones who are directly involved in the policy implementation process like the street-level bureaucrats. But most of the time they do have a fair amount of contribution to policy design, identifying users needs, knowledge input, policy

assessment and evaluation as shown in both the empirical findings and existing literature (Buffel & Phillipson, 2018; V. Menec & Brown, 2018; Y. Sun et al., 2017). And it is also common practice for researchers and scholars to be in close contact with a few (if not all) of the stakeholders in the policy research, which is the same case regarding the age-friendly development. In both cases of Manchester and Hong Kong, scholars are involved in the age-friendly development through their research. For some they even take up a role in the government or local authority in age-friendly policy design and implementation. This gives rise to the question of what role academics play in the entire process, or if they actually have a role at all.

As more and more governments emphasize evidence-based research as part of policymaking and development, academics have relatively more power in narrating, interpreting and implementing age-friendliness throughout the process and their contributions are usually being valued. It is rather how they choose to position themselves and exercise their power and influence. Academics in Hong Kong and Manchester have rather contrasting views about their positions in the age-friendly development process. While scholars in Hong Kong hold diverse views in the point of retreat, scholars in Manchester generally agree with some form of constant involvement.

At the time of the fieldwork, the involvement of scholars in the age-friendly development in Manchester and Hong Kong were different, due to a difference in the timelines when academics came into the scene between the two cases. In Manchester, the first age-friendly project was completed in Old Moat in 2012, while in Hong Kong, the first age-friendly project started in 2015. When the fieldwork was undergoing in late 2018-2019, the project in Hong Kong was still ongoing until 2020. While age-friendly research project might be a good vantage point in understanding the role of academics, it is also worth noting that some of the scholars actually go beyond the project and participate (in)directly into the age-friendly or related policymaking. Nevertheless, for the sake of avoiding the argument falling outside of the age-friendly framework, the following discussion will presumably be based on the role of academics around age-friendly research and policymaking.

In both Manchester and Hong Kong, the initial involvement of academics in the first age-friendly project was quite similar, they were to sow the seeds of knowledge about what age-friendliness means, i.e. the WHO framework being part of it, and to start off with a baseline assessment of a neighbourhood through a set of standardized guidelines, embedded in the WHO framework as well as the Vancouver protocol. However, the attitude of the researchers in both

places appear to be quite different, as much as the way they promote age-friendliness. Scholars in Manchester tend to believe that academics do have a role in the age-friendly development. They show very clear intention of continuing their involvement following the first age-friendly project. One example is the age-friendly neighbourhood project covering four neighbourhoods across the city of Manchester that began in 2016, 4 years after the Old Moat project. Besides, some researchers from the same Old Moat research team expanded their research into other related topics, e.g. co-housing, and had been conducting participatory research on co-creation with older people, under the same age-friendly framework. One could see how scholars advanced from the first age-friendly project, from doing merely age-friendly assessment and action plan design, to really looking into new ways of engaging older people, e.g., co-production. Some of them are even working for the local authorities specifically on age-friendly development after the Old Moat project. Whereas in Hong Kong, the attitude varies. Some scholars have spent years developing ageing related research and used age-friendliness as part of the lens to approach ageing issues. One example is the CADENZA project launched in 2006. It was sponsored by the Jockey Club Charity Trust with the aim of "promoting new approaches to elderly care" (Hong Kong Jockey Club, 2021) and is in collaboration with the Chinese University of Hong Kong (CUHK) and University of Hong Kong (HKU). It started off not as an age-friendly project, but according to Q, a researcher from the JCAFC project, she did try to frame the CADENZA project into the age-friendly dialogue later when the WHO launched the age-friendly movement in 2007. But nothing substantial came out of that until CUHK established its own Institute of Ageing in 2014 and that Jockey Club finally initiated the first age-friendly project in town a year after. The CADENZA project is not directly related to age-friendliness, but it is the same group of scholars working on both the CADENZA project and the JCAFC project. The difference between the two projects is that JCAFC is a one-off project with an uncertainty of continuing afterwards, while the CADENZA is still up and running till this day. Of a very similar nature, the CADENZA project is an important platform for the constant engagement of academics with the community in age-friendly related development through various forms of experimental projects and programs. On the other hand, there are other scholars who are relatively more "conservative" in terms of their engagement in the age-friendly implementation process.

So the question here is whether academics should remain involved in the age-friendly development, or they should fade out once the research is over/ once they believe the task of knowledge input was complete. And if they stay, what form of involvement should it be? This study reveals that the constant involvement of academics shows quite promising impact on the

age-friendly policy design in Manchester. Their work is being valued by the local authorities and their suggestions are being taken seriously into account in updating and perfecting the existing age-friendly strategy. Their way of experimenting different approaches to engaging older people, from collaborative design workshops, to co-production and co-creation empowers older people and encourages them to be more actively involved. Academics, in this case, share similar function as the street-level bureaucrats, even though they are supposed to be on the periphery of policy implementation process. In viewing the age-friendly development in the two case studies, the role of academics is arguably to be as significant as that of the street-level bureaucrats. Akin to the role of street-level bureaucrats, academics have the ability to connect different parties together, not limited to top-down and bottom-up stakeholders. But what differs the role of academics from that of the SLBs is their ability to lobby the local authorities or higher level of governances to take their opinions seriously through evidence-based research they conducted which is particularly helpful in policy design process, when every single decision needs justification supported by solid evidence. In other words, they have more power in influencing policy from top down than the SLBs. Together, the SLBs and the academics form a powerful duo in the age-friendly development process, eliciting changes from both top down and bottom up. What the SLBs are doing on the ground can be feedbacked up to the upper level of administration and governance through the help of the academics, and vice versa, the academics can help with translating policy visions to the SLBs who can help with implementation. This feedback system is argued to be the ideal collaborative approach in developing age-friendliness on both city and community levels. In fact, as much as WHO promotes a bottom-up approach, they equally emphasize a combined approach of bottom-up participatory approach coupled with top-down political commitment and resources, stated in the global network membership guide (WHO Global Network for Age-friendly Cities and Communities, 2019). The findings of this study further reinforce this collaborative approach, and add on to this, the importance of the “in-between stakeholders”, who are the SLBs and the academics in this case.

6.6 Conclusion

This chapter looks into the comparison of the case studies of Hong Kong and Manchester, based on the finding discussed in Chapters 4 and 5. Comparison was made around four key arguments, namely the adoption and adaptation of the WHO framework, level of governance, the roles of street-level bureaucrats and academics in the age-friendly development process. The way the WHO framework is being adopted and adapted is resulted from the varying interpretation of the WHO framework among different stakeholders at different levels, leading to different

outcomes of the age-friendly processes. This echoes the argument among existing literature as well as the WHO framework itself that it is not a one-size-fits-all solution, that the framework should be modified in different local contexts. Secondly, the top-down bottom-up dichotomy not only provides a clear lens in understanding the processes at different levels, but also reveals the gap in existing literature that the intermediary stakeholders were ignored. This gave rise to the third argument which is also the major finding of this thesis: the role of street-level bureaucrats in shaping the age-friendly development at the neighbourhood level. This thesis argues that more attention should be given to street-level bureaucrats in understanding how age-friendliness can be enacted. Lastly, this chapter also looks into the role of academics and suggests a more consistent involvement of academics in age-friendly development, particularly in the form of a collaborative partnership with other stakeholders.

CHAPTER 7
CONCLUSION: AGE-FRIENDLINESS AND BEYOND

7.1 Introduction

The previous empirical chapters presented the two case studies of Manchester and Hong Kong, in an attempt to understand the age-friendly development in the two places. The two cities are quite distinctly different in what had been happening at both the city and neighbourhood level. The neighbourhoods of Old Moat and Tseung Kwan O are two different cases particularly in the behaviours and actions taken by the SLBs in shaping the age-friendly processes. All the findings discussed in the previous chapters have various implications on how age-friendliness could be enacted at the neighbourhood level. In the light of this, this chapter aims to discuss these implications, in relation to answering the research questions and addressing the contribution to knowledge in relation to existing literature. Here it is necessary to recall the research objectives and questions that were mentioned previously:

Research Objectives

1. *To compare and examine how "age-friendliness" is interpreted and enacted at the neighbourhood level in Manchester and Hong Kong*
2. *To compare and analyze how age-friendliness is being governed at the neighbourhood level in Manchester and Hong Kong*

Research questions

1. *How do different stakeholders understand age-friendliness in Manchester and Hong Kong?*
2. *By what means are age-friendly initiatives governed at the neighbourhood level in Manchester and Hong Kong?*
3. *How do different actors/stakeholders enact age-friendliness at the neighbourhood level in Manchester and Hong Kong? How do processes of enacting age-friendly initiatives at the neighbourhood level relate and interact with those at the city-wide level?*

This chapter shall start by highlighting the importance of using the neo-institutionalist lens in understanding age-friendliness, and the comparative case study approach in answering the research questions, followed by the discussion on the major implications drawn from the empirical chapters, in relation to the research questions, namely 1) the interpretation of age-friendliness between different stakeholders, 2) the process of how age-friendliness is being governed, and 3)

the relationship between the age-friendly process at the neighbourhood and city levels. Then it shall move on to discuss the significance of the research findings, insights on policy implication and practice, and identify possible directions in this study for future research. The chapter will conclude with the final word for the readers that age-friendliness is a fluid concept that should constantly be modified and responded to the forever changing needs of older people as time passes, and as generations and generations of older people emerge. As one of the interviewees from Age-friendly Manchester said, "...what we mean by an age-friendly city is always changing, because what older people want is always changing" *[member of the Age-Friendly Manchester team, D, interviewed on 18 March, 2019],* that we should keep our mind open and bear in mind that a place will never be age-friendly "enough" if it does not keep up with the fast-changing situations in this contemporary world.

7.2 General Overview of the research approach and framework

In order to answer the research questions, the case studies focused on the age-friendly development at the neighbourhood level, which was able to explain in greater details the interaction of different stakeholders, and how exactly the age-friendly processes influenced and were being influenced by the processes occurring at the city level. It is shown from the case studies that it was at the neighbourhood level where the "clash" between top-down and bottom-up occurred. To gain a nuanced and realistic picture of how exactly age-friendliness is being put into practice, one should look at the process on the ground, where the policy receivers are directly impacted by the policy. And often times, there are at the empirical level numerous factors and circumstances at play leading to policy outcomes that deviate from the original age-friendly policy laid down from top down, hence it is of paramount importance to look at age-friendliness at the neighbourhood level, to examine what had been happening on the ground in order to identify the differences in the processes. On the other hand, as indicated in Chapter 2, existing age-friendly literature commonly adopted the ecological perspective in understanding age-friendliness, as they tried to look at how the environment impacts older people's wellbeing (DeLaTorre & Neal, 2017; Lawton, 1982; Novek & Menec, 2014; Park & Lee, 2017; Y. Sun et al., 2018). There is a gap of understanding age-friendliness through examining the interplay of different stakeholders in the process, an angle the neo-institutionalist lens is able to provide. The neo-institutionalist lens that was adopted in this study addressed the importance of not only seeing age-friendly development as an institution itself, but also addressing the need of acknowledging how the interaction of the stakeholders and the local initiatives, as well as identifying the existence of informal rules and norms, that all shaped the age-friendly process at the neighbourhood level. This thesis attempted

to provide this new lens of neo-institutionalism in looking at age-friendliness differently. In addition, the comparative case study approach is also worth mentioning as existing reviews remarked that comparative study is a growing trend and is to be encouraged in age-friendly studies, so as to draw on cross-references in understanding how age-friendliness can be enacted in different political, socio-economic and cultural contexts, taking into account how different stakeholders developed their own interpretations and versions of age-friendliness, and translated these into actual practices, as governed by formal and informal rules and norms (Moulaert & Garon, 2016; Robinson, 2016; Torku et al., 2021). So far, this thesis is one of the very first international, cross-continental comparative studies on age-friendliness in two very different contexts. However, despite the cross-national comparison, there is little evidence showing that the cross-cultural component is the major explanatory factor in understanding the variation of age-friendly development in this study.

7.3 The interpretation of age-friendliness between different stakeholders

So what does age-friendliness mean de facto? How should/do we interpret it? As widely noted in existing literature, the WHO framework is the most commonly adopted model around the world (Black & Oh, 2022; Brasher & Winterton, 2016; Cao et al., 2020; DeLaTorre & Neal, 2017; Jackisch et al., 2015; McDonald et al., 2021; Ronzi et al., 2020; Torku et al., 2021) . The WHO guide, as published in 2007, was developed based on empirical data collected from 33 cities around the globe, involving different stakeholders and older people. In the modified version, the WHO highlighted three key themes: physical environment, social environment and municipal services, cutting across the eight domains of age-friendliness (Ronzi et al., 2020; World Health Organization, 2007b, 2018a). Despite its popularity, this thesis showed that places developed their own versions of the WHO model, modified and adapted according to the varying political agenda, stakeholders' interests, shaped by their own political, economic, socio-cultural systems, both formal and informal practices, which was clearly demonstrated in the two case studies. For some places, the WHO model might even be merely used ostensibly for getting global attention and recognition. The differences are not so much about geographical, but more about the interplay among different stakeholders and also a result of intricate intertwining of contextual factors. The differences in the two cases in the interpretation of age-friendliness particularly in the adaptation and adoption of the WHO model is congruent to existing literature and the WHO age-friendly guide, that places should formulate their own strategies according to local needs, as stated in the 2016 WHO Age-friendly tool guide, "[t]he viability and scope of each step should, however, be considered in the light of the local context and be adapted to make the most of local strengths to

have maximum impact" (World Health Organization, 2016). Yet, as the literature review shows, most literature focuses either on the implementation and measurement of the WHO kind of age-friendliness or the conceptualization of the WHO model, and not a lot of existing studies were able to capture how places navigate between the WHO framework and older people's needs, or how stakeholders balanced each other's needs to create the best possible policy outcome for everyone. Moreover, if the WHO model represents the most dominant approach in understanding age-friendliness (through measurement and evaluation), are there any other approaches on the ground that better address everyday people's needs? The richness of the findings in both case studies of Old Moat and Tseung Kwan O were able to provide some hints (if not an answer) to this question and possibly fill in this literature gap.

In Hong Kong, the very strong local elements in enacting age-friendliness in the community in relation to the lack of a clear top-down age-friendly strategy constituted a unique form of age-friendliness in Tseung Kwan O. It is a case not so much about the WHO model, but about how age-friendliness can be enacted and defined in local residents' own accounts, as demonstrated in the Duckling Hill story. One reason is that the WHO concept of age-friendliness was not yet widely introduced in Tseung Kwan O at the time of fieldwork, as the JCAFC project was yet to start their second phase in Sai Kung District. With that said, local residents basically developed their own version of age-friendliness through their actions without prior understanding of the WHO age-friendliness. The process of defining and refining age-friendliness, fueled by the empowerment and active engagement of older people in shaping age-friendliness on the ground is a form of *lived age-friendliness*, which contrasted with the wider discourse of age-friendliness at the city level as a more systematic approach of evaluation and measurement under the WHO framework, as seen in the JCAFC project funded by the Jockey Club, and the age-friendly movement launched by the HKCSS. Different from WHO version of age-friendliness and existing literature that focus on the kind of age-friendliness to be measured and evaluated, lived age-friendliness is the kind of age-friendliness that is shaped and experienced through everyday encounters. The Duckling Hill case accurately described and captured the complexity of the lived age-friendliness, which was barely meticulously described and documented in existing literature.

Compared with Hong Kong, there are both similarities and differences in the age-friendly development at the neighbourhood level in Manchester. The overall age-friendly development processes at both the city and community levels are very closely intertwined with each other under the same overarching Age-friendly Manchester framework, in the sense that the general

age-friendly themes addressed at community action plan, e.g., the Old Moat action plan, pretty much follow what had been stipulated in the Age-friendly Manchester Strategy. Yet, the case study of Old Moat showed a different story when looking at the details of how exactly age-friendliness was being enacted and probably lived on the ground. The NORC in Old Moat, different to the age-friendly discourse at the city level, focused more on social connectivity among local residents, than adopting an all-encompassing approach of age-friendliness, i.e. covering the list of WHO domains or the localized Manchester age-friendly themes. As discussed in the empirical chapters, one could not generalize this finding into drawing on conclusions that neighbourhoods in Manchester do not follow the Manchester strategy. Rather, the implication of the case study of Old Moat is that there are a number of other factors at play, e.g., stakeholders who were involved, the chronological development of age-friendliness, the availability of resources, the interactions with the local residents, etc., that influenced and shaped how age-friendliness is actually being practiced on the ground. For example, members of the NORC were not so keen on age-friendly development in their own community, even though there were still a number of items in the Old Moat action plan that were yet to be carried out. When asked about age-friendliness, even the founding members of the NORC who were actively involved in the Old Moat age-friendly project could not tell even very briefly what age-friendliness actually meant to them. They were more interested in how to sustain the NORC, mainly in terms of organizing social activities. In some ways, this is also a form of lived age-friendliness, because to this group of older people, getting together and meeting people are already the best remedy to cope with loneliness. Yet, there is still some distance between this form of lived age-friendliness and the emphasis of active engagement of older people in age-friendly affairs, as laid down in the Age-friendly Manchester Strategy, and there are a number of other factors at play within the neighbourhood that caused such discrepancy, which will be discussed in the later parts.

Hence, in attempting to answer the question of how age-friendliness should/could be interpreted, this thesis argues that one should first look into the process at the empirical level, and secondly, look into the different factors that affect how the stakeholders at the neighbourhood level interpret and implement the age-friendly concept laid down from top down, and develop their own way of determining the kind of localized age-friendliness that probably best suits their needs and their neighbourhoods. One of the most important factors as argued throughout this thesis, is the role of street-level bureaucrats, which will be discussed in the next section. And exactly because of this same reason, it is equally crucial to look at age-friendly development at the neighbourhood local level, in comparison and in relation to the wider national or regional

contexts. Maybe the next question to ask is how necessary it is for the implementation on the ground to be in line with the objectives and goals set by higher level of administration, and that if age-friendly policy-making should be a two-way process: from top-down to bottom-up back to top-down, or vice versa. Overall, age-friendliness is a very fluid concept that needs constant evaluation and redefinition, according to the changing situations from both top-down and bottom-up.

7.4 The process of how age-friendliness is being enacted at the neighbourhood level

As previously mentioned, there is a research gap in existing age-friendly literature about the age-friendly processes on the ground, i.e. the cause of the discrepancy between the WHO model, the top-down age-friendly policy, and the actual practice at the empirical level. This study is one of the very first among existing ones that looks deeply into the neighbourhood level, giving a nuanced understanding of how different communities and stakeholders navigated between the expectations from the policymakers, and the needs of everyday residents within the neighbourhoods. There are a number of similar findings in both case studies in terms of understanding the age-friendly process at the neighbourhood level. Particular attention should be drawn to the presence and interactions of different stakeholders throughout the process, under the neo-institutionalist framework. In both Hong Kong and Manchester, there were a number of stakeholders at play governing the age-friendly process at the neighbourhood level, mainly local authorities, street-level bureaucrats (Sager et al., 2014) , academics, and older people. Among them, street-level bureaucrats play a central role in shaping the process in both case studies, and so are the role of academics, which will be discussed further below. It is important to highlight that the argument on the crucial role of street-level bureaucrats is one of the most original findings in this thesis. Examining the behaviours and actions of street-level bureaucrats will be one important indicator of understanding the age-friendly policy outcomes. The process at the neighbourhood level relies heavily on the street-level bureaucrats to bring different stakeholders together into open discussion and negotiations via platforms such as the Age-friendly working group in the district council. Identifying and addressing the works of street-level bureaucrats will be crucial in understanding how age-friendliness could be enacted at the empirical level, regardless of the existence of a clear age-friendly city-wide or nation-wide strategy. Despite the narratives of the two stories that both incorporated the top-down bottom-up dichotomy into the discussion, it is clear that the age-friendly process should not be seen only as either top-down, or bottom-up processes. The presence of street-level bureaucrats is exactly challenging this notion of

policy implementation only involving top-down and bottom-up players. The case studies showed that the reality is always much more complex than that.

Both Old Moat and Tseung Kwan O showed the manipulation of power of certain stakeholders in eliciting changes in the communities, particularly that of street-level bureaucrats. In Tseung Kwan O, the Duckling Hill story showed the key role of the SLBs, the social workers of the Aged Complex, who facilitated negotiation between the district council and older people in initiating local changes. Likewise, the SLBs in Old Moat, neighbourhood workers from Southway were the ones making the decisions of which neighbourhoods to be included into part of the age-friendly development plan, while leaving some others behind, restricted by the limited resources for a possible city-wide development plan. For the same reason, the neighbourhood workers from Southway decided to maintain the NORC in Old Moat to be a social group and made sure it was still under their control, for the sake of promoting the existing Old Moat prototype to other Southway neighbourhoods in Manchester. Even at the city level, the Age-friendly Manchester team, which was also defined as street-level bureaucrats due to their direct encounters with older residents on a regular basis, play an equally important role in managing the Older People's Board/Assembly, which are both under the Age-friendly Manchester and the Manchester City Council. The SLBs of Age-friendly Manchester were there to make sure older people in the city had a voice in the city development, and that their needs were being addressed and responded in as many aspects of life as possible. Even though the actions and behaviours of the above three types of SLBs varied, they share one commonality: their works were instrumental to the age-friendly development process, particularly being a good communication channel between top-down and bottom-up stakeholders. Their works argued against Lipsky's negative connotation about the SLBs being the "bad guys" who leverage their discretionary power in advancing their own interests only (Hill, 2009; Lipsky, 2010, p. xvii) . Instead, the case studies showed the opposite: most of them (if not all), at least shown in the case studies, were the "good guys" who did their best to meet the needs of older people. The central argument here is that SLBs should be properly addressed, studied and highlighted in future age-friendly research, because they are so crucial in shaping the age-friendly development process, particularly on the neighbourhood level. In fact, the value of the SLBs is their own flexibility in policy actions, which potentially creating more opportunities of how age-friendliness could be better shaped and enacted.

Another line of argument about the stakeholders is the role of academics. The findings of the case study concerning the role of academics align with existing literature, that they do have a

role in the age-friendly development (Buffel & Phillipson, 2018; DeLaTorre & Neal, 2017; V. Menec & Brown, 2018; Moulaert & Garon, 2015; Y. Sun et al., 2017). In both Manchester and Hong Kong, there were academics involved in research, policy design and policy implementation. Yet, the question to ask here is: what kind of academic involvement there should be in the process, i.e., should it just be at the beginning for policy design, or throughout the process, or in the later process for evaluation of measures? In Manchester, academics were very heavily involved not just in age-friendly research, but also in age-friendly policy design and implementation. And such involvement was consistent and long-term, e.g., Professor Chris Phillipson had been on board for 10+ years now. Their contribution was proven to be quite powerful, especially how they collaborated with the street-level bureaucrats in delivering age-friendly policies and services. At first it was collaboration at the neighbourhood level, with Southway in Old Moat, then spreading their influence on the city level by getting involved in age-friendly policy design, and at the same time expanding their work to more neighbourhoods in the city. An example is the co-production project done by Professor Tine Buffel from the University of Manchester, in which older people were empowered through co-creation of age-friendly communities. In the Manchester case, academics worked hand in hand with street-level bureaucrats in shaping how age-friendliness is being enacted in the neighbourhood, in terms of the method of involving older people in the process (e.g., co-production), and more importantly, they are able to expand the age-friendly process across different neighbourhood, and further feedback that back to higher level of governance in redefining and reevaluating age-friendliness at the city level. In contrast to Manchester, academics in Hong Kong acted quite differently. They were very conscious about their position as academics, and tended to distance themselves from the process, that they were the ones to sow the seeds of knowledge only, and they would not do anything beyond that. Despite their limited involvement, they also proved to be important stakeholders in the age-friendly development at the neighbourhood level, particularly the resources they could provide to the neighbourhood, i.e., their systematic approach in evaluation and measurement, their connection with other important stakeholders including possible funding bodies, and their expertise. The contrast between the role of academics in the two cases brings out the discussion on what exactly the role of academics should be in the age-friendly development process. How involved should they be? This thesis argues that academics should play a bigger role because the case studies showed that academics could be as important as SLBs in enacting age-friendliness on the ground. They are the ones who have close contact with residents through research, and at the same time they could measure and evaluate the progress and the results are valued by

policymakers and higher level of governance, which could in turn contribute to improvement in policy design. In this way, their role in the process is to transfer the lived version of age-friendliness from the neighbourhood level back to the policy level, which allows policymakers to improve the existing policy so as to better suits the needs on the ground. This cycle of policy improvement will be further discussed in the next section. Nevertheless, the role of academics should also be highlighted as part of the age-friendly discussion in future age-friendly research.

7.5 Relationship between the age-friendly process at the neighbourhood and city levels

This study looked at the age-friendly process not merely at the neighbourhood level but tried to understand this process in close relation to that at the city level. This perspective, as derived from the top-down bottom-up dichotomy of discussion in policy implementation study (Matland, 1995; Sabatier, 1986, 1988, 1991; Sabatier & Pelkey, 1987) laid a foundation on how to understand age-friendly process at different levels of governance. However, instead of reinforcing the dichotomy, this research argues that there must be some processes or stakeholders in between that connects the processes at the two levels. And it is through such philosophical assumption that the case studies were analyzed not just as top-down or bottom-up processes, but the interaction and linkages between the two, and who were involved in connecting these two processes.

Even though the focus of this study has been on the neighbourhood level, the empirical findings show that the process at the neighbourhood level was closely related to that at the city level. They are inseparable in the sense that what is happening on the ground is influencing and shaping what is happening at the city level, and vice versa. While it is important to study the process at a smaller scale, it is impossible to separate the discussion from the wider dimension of age-friendly process at the city level. In Manchester, the Old Moat age-friendly project was initiated as a result of the Age-friendly Manchester programme launched at the city level. The Old Moat project served as a prototype on how age-friendliness could be developed in the communities, what elements are to be incorporated. The project did prove itself to be effective in pushing forward age-friendliness in the community, and this prototype was being replicated all over the city, with the help of academics, street-level bureaucrats, and the local authorities. Likewise in Hong Kong, the good example of Sai Kung District, as seen in the efforts made by the Association and the Complex through the Duckling Hill incident and the supportive environment within the Sai Kung District Council for older people to give their voice, provided good practices to be shared with other districts in the city. Since Hong Kong still does not have a clear age-friendly

strategy from top down, it still relies heavily on community efforts in creating age-friendly communities. This is shown in the way Hong Kong applies to the WHO Global Network of Age-friendly Cities and Communities: it was the districts rather than the city who applied to the network. The degree of freedom to develop the type of age-friendliness on your own could be a blessing or a curse. On one hand, communities could decide what is best for their own residents, but on the other hand, starting everything from scratch without clear official guidance and protocol could be challenging. Through the platform of the city-wide JCAFC project, for example, Sai Kung District could demonstrate to other districts and even to the city government how age-friendliness could be enacted, how older people could be involved in the district council in deciding community affairs, how different stakeholders could gather together and give their voices and discuss, etc. Most importantly, what was being done at the neighbourhood level could bring lights on designing age-friendly strategy for the city. With that said, the argument here is to highlight the importance of getting deeper into this relationship between the local/regional, and even regional/national in developing age-friendly communities, while studying the process at a specific level. This approach could greatly enrich the findings because it would be unrealistic to look at the studied subject/issue separable from the wider context it is situated in and ignore the complexity of the entanglement of different factors and the interaction of people.

With all the above being said, this thesis suggests a collaborative approach of age-friendliness, with SLBs and academics taking up the major roles in leading the age-friendly neighbourhood project, bridging the gap between older people and the other stakeholders both at neighbourhood and city level, and giving a voice to older people through empowerment would be a possible way to further the age-friendly movement in the communities. As the findings of the case studies observed the discrepancy, however small it is, between the top-down age-friendly strategy and the actual practice on the ground. There could be a number of reasons for this. One reason, as mentioned previously, is the different interpretations of age-friendliness among different stakeholders, which was revealed in both case studies. Another reason could be the actions and behaviours of the intermediary stakeholders such as the SLBs and the academics. Yet, this reason is yet to be examined in future research, as the findings of this study are not sufficient enough to answer this. Whatever the reasons are, such discrepancy implies a gap between the expectation between policymakers and policy recipients, and this is where the SLBs and academics could step in to fill in this gap. SLBs have the social capital of the communities and the network of older people within the communities. They are familiar with the communities and the people they are serving and are able to adjust the policy goals to meet the needs of the people using their

discretionary power. As for academics, they have the knowledge in experimenting new approach, and the power to influence policy change at the higher level of governance through their research. They could feedback to the policymakers what is happening on the ground, evaluate and give further policy recommendations to improve the existing policies. This kind of collaborative approach enables more effective age-friendly development through collective efforts and creates an effective Practice-Policy Communication Cycle (Blase et al., 2015; Fixsen et al., 2013), an idea originally used in developing educational programs. As shown in Fig 7.1, this cycle informs

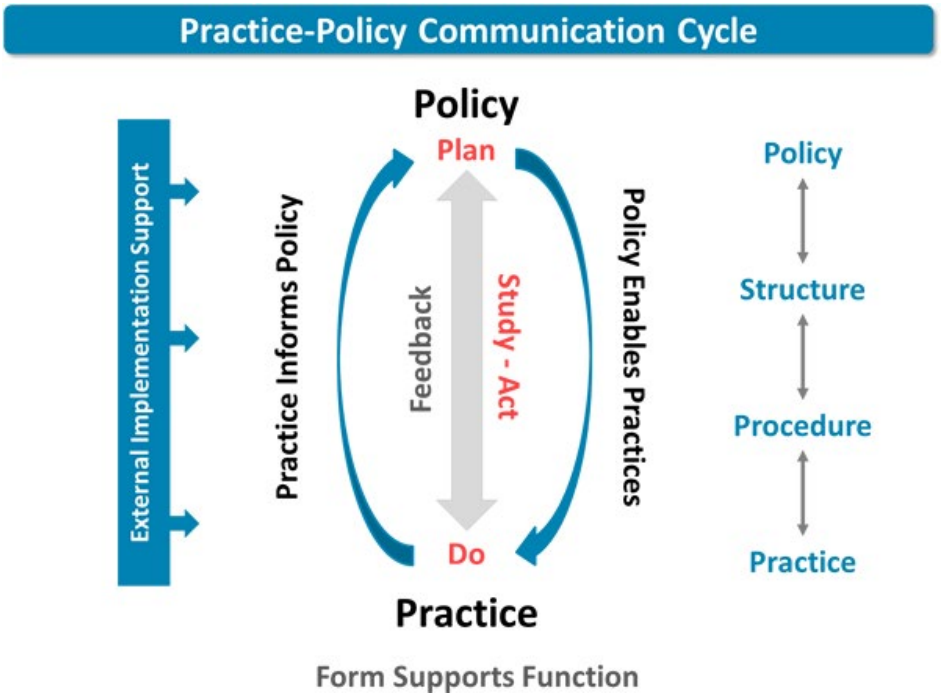

Fig. 7.1 Practice-Policy Communication Cycle

policymakers of the implementation success and barriers that can be feedbacked to improving policy. Of course, future research needs to be done to evaluate the impact and effectiveness of this approach.

Source: https://nirn.fpg.unc.edu/sites/nirn.fpg.unc.edu/files/imce/images/practice-policy-cycle2-600w.png

7.6 Critical Insights on policy implication and practice

The findings of this research not only answer the research questions but also have a lot of implications on age-friendly policymaking and practice. The following are a few suggestions on how to create age-friendly communities. They are interrelated to each other that should go hand in hand.

1. *WHO model as the starting point*

The argument around the WHO model is not a one-size-fits-all solution has been consistent throughout the thesis. Despite the question around the universality of the guide, there is no doubt that it is one of the most comprehensive age-friendly guides in the world. It is surely a good framework to start with, especially for cities and communities that have no idea on what age-friendliness is. In practice, different places have their own interpretation and manifestation of the WHO model. So the question of the day is rather on how age-friendly work can be evolved and transcended beyond the WHO model over time, i.e., how communities create their own version of age-friendly environments, that best suits the needs of generations and generations of older residents living there. With that said, one should be conscious that the WHO framework is a means, not an end.

2. *Age-friendliness as a mindset, not a label*

   One important point about age-friendliness is that it is a concept that should be embedded in all aspects of policymaking, instead of merely a label stuck on tourist brochures. The city of Manchester is a good example of how age-friendliness is being incorporated into their overall city strategy, so that policymakers and practitioners have age-friendliness in mind in designing every of the city policy and development plan. The long-term goal of age-friendly development should be about public education, i.e., changing people's mindsets.

3. *Collaborative partnership*

   Empirical findings of this research echo with the WHO framework that collaborative partnership is essential in creating age-friendly communities. As limited resources are seen as a common barrier to age-friendly work, collaborative partnership can be a possible solution to this. Different stakeholders in the society including policymakers, planners, local authorities, academics, private sector, general public, have their own expertise, knowledge, resources, skills and capital that can be great assets to age-friendly development. Collaboration can be in any form, meaning that it does not have to involve all of the stakeholders every single time. For example, the AFM Cultural Offer Programme in Manchester facilitates exchange between older people and the cultural sector. Collaborations cultivate communication and exchange, which is also related to public education and changing people's mindsets when they know each other better.

4. *Empowerment of older people*

It has been clear that older people voices should be at the core of the age-friendly development. Yet, most of the time, due to stigmatization, older people always feel vulnerable and weak. Both the Older People's Board in Manchester and the Association in Hong Kong demonstrated that it is possible to get older people involved in policymaking and decision making. This form of engagement makes them believe that they could still have a voice in the society, and that their opinions and contributions are still being valued. Making older people develop the sense of achievement is an important way of empowering them.

5. *Always involve intermediary actors*

   To ensure effective collaborative partnership, there must be intermediary actors serving as the middle person in connecting different parties together. This research clearly shows the importance of the SLBs as the intermediary actors in determining how age-friendliness can be played out in the two cities. The presence of such actors helps narrow the gaps of the top-down and bottom-up actors and facilitates better communication among these actors. Hence identifying the intermediary actors is crucial in positioning themselves and optimizing their roles in the age-friendly development process.

6. *Regularly evaluate and revise the age-friendly strategy*

   As different people in different places at different times can have different interpretations of what it means to be age-friendly, there is a need to regularly and constantly evaluate, review and revise the age-friendly strategy to make sure it best serves the needs of older people. An evaluation mechanism should be set up to ensure that the current age-friendly strategy is still valid and on track.

7.7 Way Forward: possible future research directions

Due to the limitation in resources, manpower and time, there are a number of areas that could be better addressed in future research, namely 1) comprehensive study of all the stakeholders in the age-friendly process; 2) a longitudinal study on age-friendly development process; 3) collaborative approach in age-friendly development; 4) age-friendliness in rural settings; and 5) comparative study on age-friendliness.

1) Comprehensive study of all the stakeholders in the age-friendly process

Within the limitation in resources, manpower and time, this study did its best in addressing as many key stakeholders at the neighbourhood level as possible. The original findings of this research in giving a nuanced understanding of the age-friendly process on the ground, the entanglement of the different stakeholders could be really helpful in knowing who was missing out in the game, who got less power than the other, and how they could be empowered to have their voices heard. This study was able to address the role of street-level bureaucrats and how they could change the power dynamics between local authorities and older people in order to achieve certain policy goals. However, this research was not able to cover all of the stakeholders during the process. For example, higher government officials in Hong Kong were one of the important stakeholders in age-friendly development process but were almost impossible to reach. No interview could be arranged with any of them so there is a missing puzzle in their views and positions in age-friendly policymaking in Hong Kong. It is yet to find out how exactly this power relationship was like and how it could be better addressed. Future research on the power dynamics would provide further clues on addressing different voices in the age-friendly development process.

2) Longitudinal study on age-friendly development process

The fieldwork of the study spanned around a year's time in 2018-2019, with around half a year in each place. This study was able to cover the changes in the age-friendly development in the two places in 10-15 years' time prior to 2019. However, there were enormous changes in the way of life after 2019, such as the global pandemic COVID-19, and the political unrest in Hong Kong. This undoubtedly brings drastic changes to the way older people live, which was not captured in this study. In Manchester, the researcher noticed that there were a number of expansions in the age-friendly research projects to other areas but was not able to study in detail what was happening in all these neighbourhoods, how differently or similarly the research was done in these places in comparison to Old Moat, or how much these were influenced by the Old Moat project. It would be important to address these changes and evaluate the process. In Hong Kong, the situation has drastically shifted when the extradition bill sparked off a series of city-wide mass protests in 2019. The sudden turn of events completely transformed the situation in Hong Kong, which is an entirely different scene from what it was a few years back. For example, the way district councils operate is very different within these few years. There were budget cuts due to political reasons, a number of very experienced district council incumbents were either replaced

by newly elected members or arrested due to political crackdown. And following the introduction of the national security law in June 2020, there is a lot of hidden red tapes not just around political discussion and engagement, but also different aspects of life, and in this case, the participation of older people in community planning and development. Coupled with the effects caused by the COVID-19 pandemic, there are a lot of uncertainties surrounding how the existing age-friendly work could move forward (or stagnate or possibly backward). All these changes are important factors shaping the age-friendly process and should be captured, as the central argument of this thesis around age-friendliness is about how to respond to the ever-changing needs of the people in this fast-paced world. To be able to accurately capture and account for these changes would provide further clues on how to enact age-friendliness to optimize its impact on older people.

3) Collaborative approach in age-friendly development

As existing literature suggested that collaborative partnership to be an increasing trend in age-friendly development, there is a gap in understanding collaborative approach in age-friendly development. As suggested in this thesis that it is important to identify the stakeholders in the process, and their interaction with each other, collaboration is one of the ways to bring these stakeholders together. This research was able to briefly touch on the different forms of collaboration between different stakeholders, e.g., the Duckling Hill project in Tseung Kwan O and the “Take a Seat” Campaign in Old Moat and other parts of Manchester. However there are a number of questions to be asked regarding the details on these collaborations: what kind of collaboration would be the most effective? What stakeholders are involved in the collaboration? How exactly collaborative approach is useful in creating age-friendly communities? At what level collaborative approach would be the most efficient? These are questions yet to be answered in future research. Another important finding in this study is the role of SLBs, especially their role in connecting different stakeholders together. To further the discussion from here in relation to collaborative approach, what role SLBs could play in collaborative age-friendly planning. The idea of SLBs should be incorporated in the discussion and research of collaborative approach.

4) Age-friendliness in rural settings

The entire thesis is surrounding the discussion of age-friendliness in urban settings, but rarely mentions how age-friendliness could be done in rural settings. In fact, in one of the interviews done in Hong Kong, a social worker addressed the lack of attention to older people in rural Sai Kung in terms of resources allocation, policymaking, and social service delivery. Despite there are existing literature mentioning about age-friendly development in rural areas, it is worth noting that it is usually urban cities where people who are part of the cities but are on the

peripheries of these cities that are being neglected as it is not economical to invest a lot of resources in the minority population. Yet, as the social worker working with older people in rural areas stated, that even though they are the minority, they are the ones who need the most help because of the geographical barrier, the different social structure of the rural community and relatively low social connectivity of older people in rural villages. Unfortunately, the data collected around older people in rural settings was not rich enough to produce significant findings, this part was not addressed in this thesis. If we are to study age-friendliness in a holistic manner, the rural dimension, however small it is, should be properly addressed.

5) Comparative study on age-friendliness

The comparative approach in this study provides valuable insights in how different places enact age-friendliness differently, particularly this research being one of the very first truly international comparison on age-friendly policy implementation. It shed lights on how we understand the interpretation of age-friendliness, the approach to age-friendliness, how different places adapt the age-friendly model into creating their own kind of age-friendliness, and the presence of certain key stakeholders in the process. Aligning with existing literature and recent reviews on age-friendliness, comparative study provides important cross references in age-friendly policy recommendation and implementation (Torku et al., 2021) . All kinds of comparison, be it cross-cultural, or the urban-rural divide, or regional-national comparison, would be useful in providing answers to exploring the possibilities of age-friendly approaches, and addressing the variations in different places that the global age-friendliness standard might not be able to capture.

Lastly, there are a few more suggestions on regarding the methods of conducting in-depth research on age-friendly communities. The researcher spent around a year in fieldwork, with six months spent in each of the case studies, which was long enough to have some ideas on the process, but not long enough to develop a more nuanced picture. Through the interactions with older people, the researcher found out that it is important to spend significant amount of time with the people involved to have a clearer picture of the interactions, exchange, power dynamic, and the changes happening throughout the process. Participatory observation and ethnography are what the researcher considers some of the better approaches in enriching data quality, both of which requires long hours of observation and interaction with the subjects being studied. So far, there is rarely any ethnographic study on age-friendly communities, which is believed to be able to yield interesting findings.

7.8 Final word

This thesis attempted to answer the questions of how exactly age-friendliness can be interpreted and enacted in the communities, through the case studies on two neighbourhoods in Manchester and Hong Kong. This is never an easy question to be answered. Nevertheless, this very first international comparative study provides a new understanding of age-friendliness, a lived form of age-friendliness at the neighbourhood level, with the level of details that was rarely captured in existing literature in the past. This lived form of age-friendliness counters the conventional understanding of age-friendliness laid down in the most widely adopted WHO framework. It identifies and argues the importance of an intermediary stakeholder, which was termed as streel-level bureaucrats. In the light of this, this thesis reformulated the existing understanding of street-level bureaucracy by applying it into age-friendly policy studies. Together with the role of SLBs, this study further reinforces the importance of the role of academics in the process, that provides a future direction of research, specifically in collaborative approach in age-friendly development. Apart from that, given how different the world has become in the past years, there needs to be further comparative research done on the age-friendly processes in different communities that better captures the changes reflected in the global shifts in political, economic, socio-cultural ways of life.

In fact, even though the findings provided certain insights into understanding the age-friendly development process, the more details this study attempted to dig into, the less it deemed possible in providing a one-size-fits-all solution to the challenges posed by the global ageing population trend. Contrastingly, this study is able to provide a clearer picture of what Manchester and Hong Kong have done in creating their own age-friendly cities and communities, in their own definition. It is these particularities in the case studies that showed that after all, to make a place age-friendly, it is attitude that matters more than a rigid checklist or guideline. The unique role of SLBs shown in the two cases exactly demonstrates how policies can be implemented with certain degree of flexibility. Seeing age-friendliness as a fluid concept, it is important to deal with it with corresponding level of fluidity. Lastly, I would like to end this thesis with a quote from Bruce Lee in the TV series “Longstreet” in 1971,

> *“Be formless, shapeless — like water. You put water into a cup, it becomes the cup. You put water into a bottle, it becomes the bottle. You put it in a teapot, it becomes the teapot. Now water can flow or creep or drip or crash. Be water, my friend."*

If the concept of age-friendliness is like water that could be shaped into different forms, then our attitude towards it should also “be water”, meaning to regularly review and reflect on the existing practices, always be attentive to the ever-changing needs of older people, and most importantly keep an open mind on molding age-friendly practices to creating a society that is more suitable for all ages, for generations and generations to come, so that getting old is not an issue to cope with, but an achievement to be celebrated.

APPENDIX I – list of documents reviewed

Hong Kong:

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APPENDIX II – Information Sheet and Consent form

Participant Information Sheet – Researchers/Street-level bureaucrats

Research project title: Silver Linings Graybook: A comparative study of Age-friendly development

in Manchester and Hong Kong

Research investigator: Carlo Chan

Contact details: Kycchan1@sheffield.ac.uk *or* 07802-748-262 *or* 91500812

About the project

This project aims to give a critical review on the age-friendly policies in both Manchester and Hong Kong, in terms of how the concept of age-friendliness is interpreted in local contexts.

Taking part

It is up to you to decide whether or not to take part. If you do decide to take part, you will be given this information sheet to keep (and be asked to sign a consent form) and you can still withdraw at any time without giving a reason.

About the interview

The interview will take no longer than two hours and will take the form of a conversation. The interview may contain other elements such as looking at photographs or writing about past events to help you to remember things.

The interview is being undertaken to provide the project with information about the age-friendly policies in Manchester/Hong Kong. The interview will be based on the following topics:

- The age-friendly project you take (took) part in
- Existing age-friendly policy
- Perspectives towards ageing and age-friendliness

The interview will be recorded and the interviewer will take notes during and after the interview. You do not have to discuss anything you do not want to in the interview. If at any point you feel uncomfortable with the topics being discussed you can inform the interviewer who will change the subject. You can end the interview at any time.

Will the interview be confidential?

Everything you say in the interview is confidential. When writing about the interview, your name will be changed along with any other identifying details.

What is the interview for and how will it be used?

The interview is a PhD research study. The interviewer will write notes about the interview and will use the information in writing his thesis and future publications.

If you have any questions or concerns about the interview please contact Carlo Chan via kycchan1@sheffield.ac.uk / 07802-748-262, or research supervisor Professor Malcolm Tait via m.tait@sheffield.ac.uk.

Participant Information Sheet – Older people

Research project title: Silver Linings Graybook: A comparative study of Age-friendly development

in Manchester and Hong Kong

Research investigator: Carlo Chan

Contact details: Kycchan1@sheffield.ac.uk *or* 07802-748-262 *or* 91500812

About the project

This project aims to give a critical review on the age-friendly policies in both Manchester and Hong Kong, in terms of how the concept of age-friendliness is interpreted in local contexts.

Taking part

It is up to you to decide whether or not to take part. If you do decide to take part, you will be given this information sheet to keep (and be asked to sign a consent form) and you can still withdraw at any time without giving a reason.

About the interview

The interview will take no longer than two hours and will take the form of a conversation. The interview may contain other elements such as looking at photographs or writing about past events to help you to remember things.

The interview is being undertaken to provide the project with information about the age-friendly policies in Manchester/Hong Kong. The interview will be based on the following topics:

- Perspectives towards ageing and age-friendliness
- Experience of living in the neighbourhood
- Social mobility and life satisfaction

The interview will be recorded and the interviewer will take notes during and after the interview. You do not have to discuss anything you do not want to in the interview. If at any point you feel uncomfortable with the topics being discussed you can inform the interviewer who will change the subject. You can end the interview at any time.

Will the interview be confidential?

Everything you say in the interview is confidential. When writing about the interview, your name will be changed along with any other identifying details.

What is the interview for and how will it be used?

The interview is a PhD research study. The interviewer will write notes about the interview and will use the information in writing his thesis and future publications.

If you have any questions or concerns about the interview please contact Carlo Chan via kycchan1@sheffield.ac.uk / 07802-748-262, or research supervisor Professor Malcolm Tait via m.tait@sheffield.ac.uk.

Participant Information Sheet – Policymakers/government officials/local authorities

Research project title: Silver Linings Graybook: A comparative study of Age-friendly development

in Manchester and Hong Kong

Research investigator: Carlo Chan

Contact details: Kycchan1@sheffield.ac.uk *or* 07802-748-262 *or* 91500812

About the project

This project aims to give a critical review on the age-friendly policies in both Manchester and Hong Kong, in terms of how the concept of age-friendliness is interpreted in local contexts.

Taking part

It is up to you to decide whether or not to take part. If you do decide to take part, you will be given this information sheet to keep (and be asked to sign a consent form) and you can still withdraw at any time without giving a reason.

About the interview

The interview will take no longer than two hours and will take the form of a conversation. The interview may contain other elements such as looking at photographs or writing about past events to help you to remember things.

The interview is being undertaken to provide the project with information about the age-friendly policies in Manchester/Hong Kong. The interview will be based on the following topics:

- Existing age-friendly policy
- Perspectives towards ageing and age-friendliness

The interview will be recorded and the interviewer will take notes during and after the interview. You do not have to discuss anything you do not want to in the interview. If at any point you feel uncomfortable with the topics being discussed you can inform the interviewer who will change the subject. You can end the interview at any time.

Will the interview be confidential?

Everything you say in the interview is confidential. When writing about the interview, your name will be changed along with any other identifying details.

What is the interview for and how will it be used?

The interview is a PhD research study. The interviewer will write notes about the interview and will use the information in writing his thesis and future publications.

If you have any questions or concerns about the interview please contact Carlo Chan via kycchan1@sheffield.ac.uk / 07802-748-262, or research supervisor Professor Malcolm Tait via m.tait@sheffield.ac.uk.

Interview Participant Consent Form

[Silver Linings Graybook: A comparative study of Age-friendly development in Manchester and Hong Kong] Consent Form

Please tick the appropriate boxes	Yes	No
Taking Part in the Project		
I have read and understood the project information sheet dated ___/___/2019 or the project has been fully explained to me. (If you will answer No to this question please do not proceed with this consent form until you are fully aware of what your participation in the project will mean.)	☐	☐
I have been given the opportunity to ask questions about the project.	☐	☐
I agree to take part in the project. I understand that taking part in the project will include being interviewed	☐	☐
I agree to take part in the project. I understand that taking part in the project will include being recorded	☐	☐
I understand that my taking part is voluntary and that I can withdraw from the study at any time; I do not have to give any reasons for why I no longer want to take part and there will be no adverse consequences if I choose to withdraw.	☐	☐
How my information will be used during and after the project		
I understand my personal details such as name, phone number, address and email address etc. will not be revealed to people outside the project.	☐	☐
I understand and agree that my words may be quoted in publications, reports, web pages, and other research outputs. I understand that I will not be named in these outputs unless I specifically request this.	☐	☐
I understand and agree that other authorised researchers will have access to this data only if they agree to preserve the confidentiality of the information as requested in this form.	☐	☐
I understand and agree that other authorised researchers may use my data in publications, reports, web pages, and other research outputs, only if they agree to preserve the confidentiality of the information as requested in this form.	☐	☐
I give permission for the information that I provide in this interview to be deposited in ORDA - The University of Sheffield Research Data Catalogue and Repository so it can be used for future research and learning	☐	☐
So that the information you provide can be used legally by the researchers		
I agree to assign the copyright I hold in any materials generated as part of this project to The University of Sheffield.	☐	☐

Name of participant Signature Date

Name of Researcher [printed] Signature Date

Carlo Chan

Project contact details for further information:
Researcher: Carlo Chan **Contact: kycchan1@sheffield.ac.uk/07802-748262(UK)/91500812(HK)**
Supervisor: Professor Malcolm Tait **Contact: m.tait@sheffield.ac.uk**

APPENDIX III – Ethical Approval Letter

The University Of Sheffield.

Downloaded: 27/02/2022
Approved: 24/10/2018

Carlo Chan
Registration number: 170151377
Urban Studies and Planning
Programme: Town and Regional Planning

Dear Carlo

PROJECT TITLE: Silverlining Our Future: Contextualizing Age-friendly Policies in Manchester and Hong Kong
APPLICATION: Reference Number 019514

On behalf of the University ethics reviewers who reviewed your project, I am pleased to inform you that on 24/10/2018 the above-named project was **approved** on ethics grounds, on the basis that you will adhere to the following documentation that you submitted for ethics review:

- University research ethics application form 019514 (form submission date: 25/09/2018); (expected project end date: 12/09/2018).
- Participant information sheet 1051330 version 1 (12/09/2018).
- Participant information sheet 1051329 version 1 (12/09/2018).
- Participant information sheet 1051328 version 1 (12/09/2018).
- Participant consent form 1051331 version 1 (12/09/2018).

The following optional amendments were suggested:

Please clarify the proposed length of interviews as this may affect participant's comfort with being interviewed (you suggest 2 hours in your information sheet which is rather long). What language will you interview in? How many elderly residents are you planning on interviewing? Finally how will you make ethical decisions about the photographs you will use as prompts? Are they personal photos or generic images publicly available? Clarify what numbers of elderly people you want to recruit and whether you will aim to have an equal split of male / female (policies may affect them differently). Also are other differences such as nationality or origin matter - how do these shape experiences. These information sheets are useful but what are older people reading these sheets going to understand 'age friendly' policies to mean? If I showed this sheet to my mother for example I doubt she'd understand what this referred to. Can you add in brackets a few examples of relevant policies to help participants understand what you want to discuss. You will have to think about what you will do in interviews if the participant has no idea what you are talking about. Please clarify the interview arrangements. The anticipated duration of the interviews is up to two hours which is of some concern, but this concern is intensified if there is any chance at all that these interviews may be conducted in parks or community centres (rather than recruitment alone).Consider the practicalities of this.

If during the course of the project you need to deviate significantly from the above-approved documentation please inform me since written approval will be required.

Your responsibilities in delivering this research project are set out at the end of this letter.

Yours sincerely

Simon Beecroft
Ethics Administrator
Urban Studies and Planning

Please note the following responsibilities of the researcher in delivering the research project:

- The project must abide by the University's Research Ethics Policy: https://www.sheffield.ac.uk/rs/ethicsandintegrity/ethicspolicy/approval-procedure
- The project must abide by the University's Good Research & Innovation Practices Policy: https://www.sheffield.ac.uk/polopoly_fs/1.671066!/file/GRIPPolicy.pdf
- The researcher must inform their supervisor (in the case of a student) or Ethics Administrator (in the case of a member of staff) of any significant changes to the project or the approved documentation.
- The researcher must comply with the requirements of the law and relevant guidelines relating to security and confidentiality of personal data.
- The researcher is responsible for effectively managing the data collected both during and after the end of the project in line with best practice, and any relevant legislative, regulatory or contractual requirements.

APPENDIX IV – Interview Schedule

I. Policymakers/government officials/local authorities:

A. Age-friendly policy
   1. What is the background of the existing age-friendly policy? How did it evolve?
   2. How much do you understand about the WHO age-friendly model? Is it (in any sense) used/applied in the local age-friendly policy? If so, how far has it been used in the local context?
   3. What is the existing age-friendly policy? How is it being implemented?
   4. In your opinion, in what aspects does the existing policy bring impact to older people in the region? i.e., enhance age-friendliness, improve the physical environment, quality of life, etc.
   5. What are the limitations and difficulties in implementing the policy? In what aspects do you think the current age-friendly policy needs to improve on?
   6. What is the next step/future plan in promoting age-friendliness?

B. Perspectives towards ageing and age-friendliness
   1. In your opinion, what do elderly in the region mostly need?
   2. In your opinion, what is an ideal retirement life? How do you picture your retirement life to be like?
   3. What does age-friendliness mean to you? How do you think age-friendliness could be achieved in the local context?
   4. Do you think family is an important aspect of older people's lives? How much do you think family values affect the current age-friendly policies?
   5. How would you describe older people? In your opinion, how does the society see older people in general?

II. Street-level bureaucrats:

A. Age-friendly policy
   1. What are the existing age-friendly policies/measures?
   2. How much do you understand about the WHO age-friendly model? Is it (in any sense) used/applied in the local age-friendly policy? If so, how far has it been used in the local context?
   3. In your opinion, in what aspects does the existing policy bring impact to older people in the region? i.e., enhance age-friendliness, improve the physical environment, quality of life, etc.
   4. What are the limitations and difficulties in implementing the policy? In what aspects do you think the current age-friendly policy needs to improve on?

B. Views towards ageing and age-friendliness
   1. In your opinion, what do older people in the region mostly need?
   2. In your opinion, what is an ideal retirement life? How do you picture your retirement life to be like?
   3. What does age-friendliness mean to you? How do you think age-friendliness could be achieved in the local context?

4. Do you think family is an important aspect of older people's lives? How much do you think family values affect the current age-friendly policies?
5. How would you describe older people? In your opinion, how does the society see older people in general?

III. Researchers:

A. About the age-friendly city project
   1. What is the background of the research?
   2. What exactly is the age-friendly project about? Does it involve the community? If yes, how?
   3. How does the research impact policymakers or older people?
   4. In your opinion, what role do researchers play in enhancing age-friendliness in the region?

B. Age-friendly policy
   1. What are the existing age-friendly policies/measures?
   2. How much do you understand about the WHO age-friendly model? If so, how far do you think it has been used in the local context?
   3. In your opinion, in what aspects does the existing policy bring impact to older people in the region? i.e., enhance age-friendliness, improve the physical environment, quality of life, etc.
   4. What are the limitations and difficulties in implementing the policy? In what aspects do you think the current age-friendly policy needs to improve on??

C. Views towards ageing and age-friendliness
   1. In your opinion, what do elderly in the region mostly need?
   2. In your opinion, what is an ideal retirement life? How do you picture your retirement life to be like?
   3. What does age-friendliness mean to you? How do you think age-friendliness could be achieved in the local context?
   4. Do you think family is an important aspect of older people's lives? Do you think it is the family's responsibility to take care of older people in the family? How much do you think family values affect the current age-friendly policies?
   5. How would you describe older people? In your opinion, how does the society see older people in general?

IV. Older people:

A. Views towards age-friendliness/age-friendly policy
   1. Are you aware of any kind of services that are available to you? If so, how often do you use these services?
   2. Have you heard of "age-friendliness"? What do you know about existing age-friendly policy in the region? (If not, Q5)
   3. Can you describe/list the age-friendly measures in the community that you know of? How far do these measures help improve your daily life? If yes, in what aspects?
   4. What are the measures that you do not like about? How do you think these can be improved?

5. Do you know who are responsible for the age-friendly policy? Have you ever got in touch with any of the policymakers/organizations that are involved in the age-friendly policy? Do you know of any platform that you can communicate with them?

B. Experience of living in the neighbourhood
   1. What are your daily routines? How often do you go out?
   2. What sort of things affect your desire to go out on a particular day? How important are these in influencing your decision?
      - Weather
      - Physical condition
      - Socializing
      - Special occasion
      - Physical environment
      - Mood
      - Any other reasons?
      - Daily routine, i.e. groceries, exercise
   3. How would you describe the places you usually go to? Do you find it difficult to get to these places?
   4. What are the common barriers in your trips? What do you expect to improve about these barriers?
   5. Do you have any good/bad experience of feeling respected/disrespected?
   6. How would you describe your neighbourhood? Can you list some of the good/bad things concerning the physical environment?
   7. Do you enjoy living in this neighbourhood? Do you wish to stay here for the rest of your life? Why?

C. View towards ageing and family
   1. How do you picture your retirement life? How similar or different is it from your current life?
   2. How important do you think family is in an older person's life? How important family is in your current life?
   3. How would you describe your relationship with your family? Do you think it is the responsibility of your family to take care of you when you get old?
   4. Do you think ageing is a good/bad thing? How do you apprehend ageing?

D. Social mobility and life satisfaction
   1. How often do you meet and contact your family/your friends?
   2. How active are you involved in the community? Do you volunteer or get involved in community work?
   3. Are you satisfied with your current life? Do you have any short-term plans? If yes, what are they?

APPENDIX V – List of events attended for participatory observation

Location	Events/activities	Content	Date
Hong Kong	Age-friendly Hong Kong Summit 2018	Age-friendly City Appreciation Scheme – Recognition Ceremony	November 25, 2018
	JCAFC Public Forum	Update on the JCAFC project	December 4, 2018
	Tseung Kwan O Dementia Friendly Community Service Program	Closing Ceremony	December 15, 2018
	Rural Medical-social Collaboration Symposium 2019	Development of rural medical-social collaboration in rural Sai Kung	January 12, 2019
	Field visit to Duckling Hill	Field observation of the facilities and the environment of Duckling Hill	February 4, 2019
Manchester	Slipper Exchange*	NORC monthly event	April 18, 2019
	Coffee Morning*	NORC bi-weekly social activity	April 25, 2019
	Field visit to Copson Street	Visit participating shops of Take a Seat Campaign	May 1, 2019
	Hanging Basket*	NORC monthly event	May 16, 2019
	Ladybarn Lunch	Regular social events organized by Ladybarn Community Hub	May 23, 2019
	Strawberry picking event*	NORC monthly event	June 28, 2019
	Older People's Assembly Meeting	Quarterly meeting of the Assembly, organized by Age-friendly Manchester	November 21, 2019

**Events organized by Southway Housing Trust*

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