

**United Nations programme on ageing  
Department of Economic and Social Affairs**

**Expert group meeting on modalities for review and appraisal of the  
Madrid International Plan of Action on Ageing**

**10-12 November 2003, Malta**

**Report**

**New York 2003**

## **Introduction**

The Expert Group Meeting on Modalities for Review and Appraisal of the Madrid International Plan of Action on Ageing (MIPAA) was held at the Corinthia San Gorg Hotel in Malta from 10 to 12 November 2003. The meeting was hosted by the Government of Malta and organized by the UN programme on ageing of the Department of Economic and Social Affairs in cooperation with the International Institute on Ageing (INIA).

This report is based primarily on the discussion at the meeting. In addition, the written submissions of experts and observers, as well as some background material prepared by the UN Secretariat, are also incorporated in the report.

## **Objectives**

The overall objective of the Meeting was to contribute to the elaboration of the modalities for the review and appraisal of the Madrid International Plan of Action on Ageing and, specifically, to:

- Propose the content and elaborate the methodology of the bottom up approach to the review and appraisal exercise;
- Suggest actions at national, regional and global levels to undertake the bottom-up approach to the Plan's review and appraisal;
- Elaborate recommendations on how to gather information utilizing a bottom-up approach at sub-national (local) and national levels;
- Make proposals for collection of information and data for national monitoring of the Madrid Plan;
- Suggest measures to support the process of review and appraisal at local and national levels.

## **Participants and Agenda**

The meeting was attended by 13 experts from all world regions and 10 observers from Governments and entities of the United Nations system. (See Annex I for List of Participants.)

Agenda of the meeting included the following items:

1. Dimensions of the review and appraisal: ageing policies and mainstreaming ageing into development policies.
2. Content and modalities of a bottom-up approach to national review and appraisal of MIPAA. Role of different stakeholders.
3. Gathering of qualitative information for national review and appraisal of MIPAA.
4. Indicators and data collection for national monitoring of MIPAA.

5. Consolidation of national findings of review and appraisal at regional and global level. International support for review and appraisal at the national and local levels.

### Opening Ceremony

Mr. Gaetan Naudi, Permanent Secretary, Ministry of Foreign Affairs of Malta, speaking on behalf of the Minister of Foreign Affairs, welcomed the participants and noted the contributions since 1969 of the State of Malta and its pioneering efforts through which the first World Assembly on Ageing was initiated.

Professor Frederick Fenech, Director of INIA, outlined the many achievements and inroads INIA has made in training over 2,000 practitioners in ageing since 1988, and included mention of its global quarterly *Bold*; its many partnerships, including with the UN programme on ageing and UNFPA, and concluded by stating INIA's support for an evidence base to inform the monitoring process of MIPAA.

Mr. Francis Ajuis, Parliamentary Secretary for the Elderly and Disabled, speaking on behalf of the Minister for Social Policy, outlined the need to fight the stigma of ageing and to change attitudes towards older persons, but recognized that it is a long process. He reiterated Malta's strong stance against euthanasia and referred to Malta as an "epidemiological paradise", given its unique conditions for conducting population studies, including those on ageing. In implementing MIPAA, he felt, quality of life issues must be outlined in practical terms and transmitted to all policy levels.

### ***Agenda Item 1 – Dimensions of the review and appraisal: ageing policies and mainstreaming ageing into development policies***

The UN Secretariat outlined the two-pronged approach to the review and appraisal exercise, which includes monitoring *ageing specific* policies as well as the extent to which ageing is mainstreamed into *development policies*. The scope of each national review and appraisal exercise will be defined by the specific priorities and objectives to be decided by Governments, which have the primary responsibility for implementing the Plan, in consultation with other stakeholders, including older persons themselves, civil society organizations, academia and the private sector.

The Madrid Plan established three priority directions for *specific action on ageing*: older persons and development; advancing health and well-being into old age; and ensuring enabling and supportive environments. The recommendations within these three priority directions provide a framework for designing policies and programmes that address the specific needs and expectations of older persons, and respond to the challenges and opportunities of population ageing. The participants highlighted the most important actions toward implementation of the recommendations of Madrid Plan, as summarized in the following paragraph.

Ageing specific policies should strive to eliminate discrimination and social exclusion of older persons, ensuring the widest possible involvement of older persons in social, economic, cultural and political life. Activities aimed at building public awareness should sensitize youth and other age groups on the importance of promoting the rights of older persons. Education and training could empower older persons to act as opinion leaders in the most important and sensitive areas related to ageing, such as human rights, income security, health protection, housing, and political and social participation. Provision of training, particularly in educational facilities, would enable older persons to continue to participate equally in society. Since many older persons work beyond retirement age, it is important not to bar older persons from that option. Active employment policy and programmes for older persons should be promoted including through the development of reliable databases of older employees, containing information of their previous work experience, skills and personal capacities. Policies and programmes that benefit older persons could include the issuance of senior citizen cards to certify the entitlements of older persons to available services, such as free medical and social services, or to reduced fees for such services, or waiving municipal taxes. National policy should secure a minimum income for older persons and promote designing specific savings instruments for them. Retirement schemes and benefits should cover every older person. Health care services should range from preventative and curative to rehabilitative. Conditions for appropriate and adequate housing should be created. Establishing day care centres within a wider network of social assistance is also an important objective.

The participants stressed the usefulness of national needs assessment surveys, which could gather information on the status of older persons and on existing institutions catering to their needs. The main objectives of needs assessment studies would be to obtain a preliminary profile of social and economic problems that older persons face and establish sound databases, including virtual reference centres, on the quality of life of older persons .

One of the most significant premises of the Madrid Plan is its call to link ageing to development and its resultant recommendation for ageing to be mainstreamed into all policy areas, with particular emphasis to national development frameworks and poverty eradication strategies. In its attempt to go beyond social welfare concerns and link ageing to development, the Madrid Plan addresses ageing within a framework of poverty reduction, participation, gender equality, and human rights. Ageing specific and ageing mainstreaming actions are closely linked and could even be overlapping like for instance the employment policies. Mainstreaming ageing refers to all-inclusive efforts to reconcile population ageing and societal development, therefore mainstreaming efforts are multi-dimensional and could include legislative review to identify possible age discriminatory provisions for future amendments and reform; age-specific research; institutional capacity building; and training and advocacy. To facilitate the process of mainstreaming, ageing policies could be declared a national priority. In order to coordinate the national mainstreaming process, a single lead agency, governmental or non-governmental, could be given such a responsibility. Civil society groups and coalitions that are already engaged in development programmes and activities, such as poverty reduction efforts,

should be encouraged to include and monitor ageing dimensions in their agendas and to advocate for inclusion of these issues in poverty reduction strategies. International development partners could conduct an "ageing impact analysis" of programmes and projects, similar to the analyses of gender or environmental impact that many of them already undertake. In order for the broader public and other groups to be engaged, ageing issues are to be aligned with other cross-cutting issues, including HIV/AIDS; rural development, agriculture and land rights; children; education; unemployment; health and poverty.

The Madrid Plan calls for ageing to be linked to development issues and to be embedded into development targets and agendas. Thus an important component of monitoring will be to track the extent to which mainstreaming occurs and how ageing is integrated in development policies. In many developing countries, the most prominent instrument for poverty eradication is the PRSP (Poverty Reduction Strategy Paper)<sup>1</sup>. One important signpost of successful implementation, therefore, may be the extent to which ageing is integrated into national poverty policies and the PRSP process. In assessing their national poverty reduction strategies governments should be able to simultaneously review implementation of the poverty, employment and human rights objectives and recommendations of the Madrid Plan (see Priority direction I of the Madrid Plan).

Given the multi-dimensional nature of the mainstreaming process, its review and appraisal should include multiple instruments, such as already mentioned legislative review, budget monitoring across sectors at both the local and national level and age-specific analysis of institutional capacity building, training and advocacy. Programmes and activities targeting older persons – both ageing specific and aimed at mainstreaming ageing – could be evaluated by analyzing reports and studies produced by municipalities, the private sector, academia and civil society organizations. A procedure for detecting and correcting any discrepancies between policies on ageing and policies and programmes in other sectors, particularly macroeconomic and financial policies, should be established at the national level.

### ***Agenda Item 2 - Content and modalities of a bottom-up approach to national review and appraisal of MIPAA. Role of different stakeholders***

#### **Content and modalities: major components**

The Commission for Social Development, at its forty-first session in 2003, endorsed a bottom-up approach to review and appraise the implementation of the Madrid Plan of Action. The bottom-up approach is defined as an open-ended, participatory process that seeks to incorporate and link local and national activities to UN regional intergovernmental bodies and up to global level of the review and appraisal.

---

<sup>1</sup> See <http://www.worldbank.org/poverty/strategies/>

The *central idea* of the bottom-up approach is to allow the traditional intergovernmental deliberative process to benefit from a sound and carefully considered participatory assessment of whether or not the Madrid Plan's objectives are being achieved at local, national, sub-regional and regional levels.

A bottom-up participatory approach is expected to offer the following advantages:

- to broaden the sources of information available to policy makers by complementing statistical and other data with qualitative information;
- to provide governments with policy relevant information when other information does not exist – when statistics or other data are not available and cannot be gathered on short notice;
- to establish priorities for policies and programmes that reflect peoples' interests;
- to monitor and evaluate the implementation of policies and programmes and reorient them if needed;
- to provide an opportunity for people, particularly those who are excluded or marginalized, to articulate their conditions, needs and aspirations.

The bottom-up approach to review and appraisal should be seen as an on-going process rather than a product delivered at a certain time. In this sense, the bottom-up review and appraisal should be seen as an innovative tool for social analysis, as it promotes the inclusion of views from groups that may have been previously excluded from traditional sources of information.

Review and appraisal is an essential element of the implementation of the Madrid Plan. A bottom-up participatory approach to assessing the implementation of the Plan includes several key *components*:

1. Awareness raising/advocacy;
2. Assessment of needs and setting of targets;
3. Gathering of information;
4. "Distillation" of the local findings into policy-relevant formats; and
5. Adjustment of policies and programmes in accordance with the conclusions and recommendations of the review and appraisal.

At the same time, the monitoring process should be seen as a series of *parallel* developments rather than *sequenced* steps of the above components, and must include a feed back mechanism so that policy can be adjusted as necessary.

Raising awareness at national and local levels about the Second World Assembly on Ageing and the recommendations of the Madrid Plan of Action should precede the actual process of the Plan's implementation, including its review and appraisal. In order for people to be able to participate in a review and appraisal activity, they must first be informed of the content of the Madrid Plan of Action. The ultimate goal of this initial stage, therefore, is to inform older persons, as "primary" stakeholders, of their rights, responsibilities and opportunities as defined in the Madrid Plan, and establish a notion of

local ownership of its implementation and follow-up. Mobilization through provision of information, and education and communication activities can help older persons to understand that they have a critical role in the bottom-up approach. In practical terms, translation, publication and wider distribution of the Madrid Plan was recommended.

An advocacy campaign should lead to the assessment of local needs, setting targets and formulation of appropriate programmes of action. Views on the practical implementation of the relevant parts of MIPAA and how they can be translated into country specific policies should be sought individually and collectively, at both the local and national level. Older persons should directly participate in decision making through their involvement in the process of consultations. Such consultations could include health practitioners, service providers, local governmental officials and older persons themselves. Documentation of the outcomes of consultative meetings can provide a rich source of information about whether and how the MIPAA recommendations are being translated into practice and how they impact the lives of older persons and their families. Local level monitoring and appraisal exercises could be ongoing and feed into existing reporting frameworks, such as for the MDGs. Specific reviews of implementation of MIPAA would therefore be integrated into MDG reporting processes and occur every three to five years. Information specifically relating to MIPAA implementation could be collated through an additional series of meetings, workshops and documents.

## **Stakeholders**

The all-encompassing nature of population and individual ageing demands that the review and appraisal of implementation should engage all major stakeholders: older persons, governments, civil society, academia, the private sector, and international organizations.

The bottom-up approach will ultimately take place at different *levels*, and different types of *stakeholders* will be involved. It should be inclusive, involving all – or as many as possible – stakeholders. Individuals and members of communities will participate at the grassroots level, where it is also likely that local leaders and municipal authorities, government workers, politicians, academics, representatives of NGOs or CBOs and many others would be engaged. A bottom-up approach should allow the perceptions and experiences of local people, and particularly older people (the "primary" stakeholders and target group), to feed into policy-making, planning, implementation and monitoring and evaluation.

The degree of commitment of authorities will determine how well the process functions. Support from higher up is essential, and national governments should assume responsibility and *facilitate* the process without necessarily *directing* it. Government should be open to various ideas and willing to mainstream ageing issues into all policy areas. The involvement of existing elected bodies, including legislative structures, and interested elected officials can be especially important for motivating and sustaining the

process. The already established participatory processes, such as networks of concerned organizations, could offer useful experience.

UN agencies, with particular use of local field offices, can provide specific contributions in their areas of expertise: ILO - employment and social protection; WHO – healthy ageing and lifelong development; FAO - rural ageing and development, for example.

Civil society organizations, many of which have substantial experience in ageing and development, should be actively engaged. Stakeholders from the non-governmental, academic and scientific community bring experience and insight, an integral feature of any successful outcome. NGOs and academic institutions are important in both collecting and distilling information from the local to the national level. They can supply government with useful information and provide findings concerning the situation of older persons and their needs as they work directly with older persons. They can also provide operational support for the feedback mechanism of the review and appraisal through measuring the impact of policies that are being implemented. Older persons must be included at all levels and in all components of the review and appraisal, including the processes of gathering of information, its distillation and decision making for policy development.

Various NGOs should fully cooperate on behalf of older persons; in addition, they should reach out to the grass roots by promoting, supporting and facilitating community projects for the well-being of older persons. Nation-wide networking of NGOs should be established for more efficient impact. Older persons should be encouraged to join associations that serve as pressure groups and seek training in various areas. The role of media should be in the realm of advocacy i.e. in educating and informing citizens about issues pertaining to ageing and the impact that the ageing process will have on all spheres of society, including family, economy, culture and politics. The private sector should – apart from providing funding when possible – remove corporate policies that discriminate against older persons, and provide retirement training and contribute to community development schemes targeting older persons. The essential role of academia is to provide data through research, engage in national and local capacity building and assist in policy formulation and evaluation.

Overall, the cumulative impact of partnerships in the review and appraisal could be considerable, with potential to provide a richer context and deeper understanding of the issues and just how varied and multifaceted the responses can be. The key is to ensure that the review and appraisal process appropriately utilizes the experience, expertise and resources of all stakeholders at the local and national level, and that this process is linked to the sub-regional and regional levels.

## **Organization and Coordination**

Somewhat paradoxically, for a bottom-up approach to function appropriately, particularly at its initiation, a top down central mechanism was felt to be needed. Such a mechanism,



which should be established at the national government level, would be useful for establishing priorities for local action, and, most significantly, for encouraging the ownership of the process at the grassroots level.

The role of the government includes assistance in clarifying the roles of various stakeholders, including how to get multiple stakeholders interested in the process, and what kind of procedure should be adopted to meet different expectations. It would also be useful to support the bottom-up approach by legislation.

A suitable coordinating mechanism for the national monitoring process should be established, or the coordination of existing entities should be improved. This might be done through governmental body with well-established links to other ministries and governmental entities, research institutions, local authorities, NGOs, international organizations and UN agencies. Such a body could include the lead agency charged with responsibility for mainstreaming ageing, as well as representatives of all the major stakeholders. Better coordination of multiple efforts is the goal

In addition to this, the Government should consider establishment or designation of a national *autonomous* body with *advisory* function, in order to ensure the independent and impartial monitoring of progress in implementation of the Madrid Plan. As recommended in the Madrid Plan, "independent, impartial monitoring of progress in implementation is also valuable and can be conducted by autonomous institutions"<sup>2</sup>.

Some countries have already established independent advisory bodies (committees, commissions) on ageing and concerns of older persons, consisting of academicians, private sector and NGOs with the task to mainstream the issue of ageing into all policies. Such bodies could be set up as a watch dog for government policy-making, since top down machineries often overlook the needs of older persons. Advisory bodies would incorporate opinions and facilitate close and regular monitoring of policy implementation at the local (community, village, district, etc.) level. Equally important, such bodies could evaluate policy proposals by government, assess the impact of newly proposed policies on older persons and suggest possible changes. Advisory bodies could be established at the local, regional and national level. For example, Austria has established a fully independent council of senior citizens with rights and responsibilities similar to those of a chamber of commerce, which has become a major contributor to discussions on national policy on ageing. In India, the National Council of Older Persons consists of 25 per cent of government representatives and 75 per cent of participants outside of government, such as academics and retired persons from both rural and urban communities. This body has been accepted by the government as a watchdog agency to monitor policy on ageing. The law in Mexico requires that senior citizens are to be included in advisory bodies concerned with relevant issues. In Chile, the recently created National Service for Senior Citizens (SENAMA) includes an advisory committee composed of representatives of older persons' organizations, academia and institutions working with older persons. In general, bodies representing the interests of older persons have to enjoy independence and could be in an advisory position for monitoring the implementation of MIPAA.

---

<sup>2</sup> MIPAA, paragraph 119.

### ***Agenda Item 3 - Gathering of qualitative information for national review and appraisal of MIPAA***

The essence of the participatory method is to listen to stakeholders and give them a chance to state their views at different stages of the process. This allows a different type of information to emerge, which may be more *qualitative* in nature, to complement *quantitative* monitoring. Participation is a means to a more effective monitoring strategy, as well as a means for stakeholders to gain voice in their country's political processes. At the same time, for qualitative data to be useful in the policy process, an agreed framework is needed for the whole process of collection and processing of information as otherwise it could become an opportunity for simply "venting feelings".

The bottom-up approach envisages that older persons will be active participants in the review and appraisal process. This could be ensured by establishing procedures for transmitting to policy makers the views of older persons regarding the impact of policies that affect them.

Given the heterogeneity of issues related to ageing and corresponding policy responses, entry points of information for evaluation of the Madrid Plan have to be multitudinous and not confined to a single method or source. It is also important to gather "new" information on those groups of older persons who were neglected in policy action, such as rural elderly, especially rural older women. In order to engage civil society in policy development, monitoring and evaluation, many forms of participatory research and assessment are being used by donors, development agencies and governments. Gathering of *primary* information will be undertaken at the local level (community, village, district, etc.). The primary information could be collected by utilizing a *focus group* methodology. Regular *focus groups* consist of older persons, frontline service workers, service user groups, family caregivers, older volunteers and all other valuable informants on how well policies have been realized. *Watch dog groups*, such as district coordinating committees, could be established to review the impact of different policies and programmes on older persons. A *group monitoring* process can be organized, taking advantage of existing community groups or organizations, and involving persons of all ages. *Mini surveys* based on representative samples could also bring interesting local findings to light.

Some examples of activities utilizing a bottom-up approach can be found in China, where "Speak for Yourself" and "Let the People Speak" programmes brought useful results, especially allowing to find out how much relevant assistance individuals receive from government. The Government of India is initiating a model for a bottom-up approach of integrating and addressing the concerns of older persons, from the lowest level of administration of a village and moving up through state Governments up to the federal Government. Local opinion making groups will provide forums where older persons can discuss their concerns and the actions that must be taken in order to ensure the assessment, review and implementation of the policies on ageing, both vertically and

horizontally. HelpAge International is piloting an "Older Citizens Monitoring Project" in five countries. Through the project, communities decide which aspects of policy affecting older persons they wish to monitor, which indicators to develop and methods of data collection to use. Communities will present their findings as they relate to national policies, the implementation of the Madrid Plan and national poverty reduction strategies.

Gathering information at local level, as a core activity of the bottom-up approach, could be supplemented by other relevant sources and methods. For example, national reviews/surveys according to the main themes of MIPAA could be conducted by an advisory body recognized by government. In addition, expert panels consisting of policy makers, NGOs, and consumer representatives, as well as policy symposia and periodic national reviews conducted by local institutions could become common yet important supplementary tools in national review and appraisal exercise.

Once information has been collected it will have to be passed along through provincial to national authorities. It is important for Governments to clarify the process by which this will take place. Rules, legislation, traditions, networks, ethnic alliances, patronage, political allegiances and bureaucratic structures all interact to form a complex and fluctuating environment through which information will be channelled.

A major challenge of the bottom-up approach is to be able to “distill” the findings of local consultations into policy-relevant formats that are meaningful at national and international levels. As the information obtained is passed up from the local level to national and regional levels, efforts must be undertaken to identify relevant experience and draw lessons for policy. Part of the distillation process will be to prioritize critical issues from among the many valuable inputs that will be received from the local level and later, from the national level. Overall, the findings must be translated into recommendations for improving policy and programme design in order to promote the better implementation of the Madrid International Plan of Action on Ageing in local and national contexts.

It is important that the “distillation” of gathered information occurs at all levels of the process. It should not necessarily be assigned to a particular body or confined to a particular stage of the review and appraisal process. Normally, verification of findings has to be undertaken *in situ*, particularly since locally detected issues would require local solutions. At the same time, the distillation needs to be carefully coordinated so as not to discount the heterogeneity of older population and the diversity of the information already gathered. In order to achieve this, partnerships involving all major stakeholders are required in order to collate all the information and feed it into the appropriate channels throughout the review and appraisal exercise. Information, once analyzed and “distilled”, needs to be fed simultaneously back down to the community as well as up to the national level.

Practical tools of gathering and distillation of information could be various methods of social assessment. Within these methods, an interaction of researchers with various stakeholders can assist governments to better understand implications of policies. Social

assessment training provided in Jamaica by technical advisors of the UN Division for Social Policy and Development could serve as a model for building local and national capacity in the area of social policy development, implementation and monitoring. It is also important to give prominence to collection, analysis and distribution of suitable models, or "best practices", which should be combined with training and other forms of technical cooperation and support.

The national level of the review and appraisal process is where the findings must be translated into recommendations for improving policy and programme design in order to promote the better implementation of the Madrid International Plan of Action on Ageing in local and national contexts. The process of review and appraisal should be facilitated at the top government level and supported by national legislation. The role of Government is crucial for ensuring sustainability and continuity of the appraisal process, including through provision of financial assistance to the local level.

#### ***Agenda Item 4 - Indicators and data collection for national monitoring of MIPAA***

In addition to, and in connection with the bottom-up approach, countries will wish to monitor the implementation of the Madrid Plan with the help of indicators. These indicators would be used as tools for internal (local, national) monitoring, assessment, and advocacy. However, countries should not be subject of international ranking concerning the implementation of MIPAA.

MIPAA makes several references to data collection and the development of indicators to gain better information on the quality of life of older people. As noted in MIPAA, elaborating and using comprehensive and practical tools for evaluation, such as key indicators, is necessary to facilitate a timely policy response. The Plan also states that indicators for its monitoring should be linked to such issues as poverty and standards of living, as well as the health status of older persons. The bottom-up approach envisages that gathering and compiling of data and research findings will be the components of the review and appraisal of MIPAA.

The UN Secretariat has suggested a set of indicators to assist the bottom-up approach to review and appraisal of the Madrid Plan. The suggested indicators for monitoring and review and appraisal of MIPAA are organized by objectives that pertain to priority issues within the three priority directions of the Plan. The proposed indicators are formulated on the basis of actions as recommended in MIPAA and aim at assessing the progress in reaching the Plan's objective. Efforts were also made to link the proposed indicators to those for monitoring the Millennium Development Goals (MDGs): several indicators for MIPAA's review and appraisal, both instrumental and outcome, are based on the MDG indicators.

Two types of indicators were proposed: instrumental and outcome. The instrumental indicators aim at evaluating the availability of programmes and policies, which have been adopted to address issues of population ageing and improve the well-being of older

persons. The principal sources of information are reports of government, NGOs, private sector and international organizations. The outcome indicators attempt to identify positive or negative changes in the quality of life as well as in socio-economic conditions and in the health of older persons during a defined period of time, which subsequently could be related to policy intervention or inaction. Both quantitative and qualitative indicators are suggested. It should be noted that the process of selection of indicators is an evolving one, and from this point of view the suggested set should be regarded as a point of departure: the prioritized actions and targets that might differ from country to country should inform the actual selection of appropriate indicators. Thus, the list of suggested indicators by no means should be considered as either exhaustive or prescriptive, and member States would choose those indicators which are most relevant to local circumstances.

Three methods of data collection are most commonly used: population censuses, civil registration and household surveys. Information collected through these traditional methods is of paramount importance to monitor the situation of older persons in a particular country. It is also desirable to assess the situation of older persons in relation to conditions in the broader society, as well as in relation to an absolute standard which is often only implicit. In addition to traditional methods of data collection, information and data from other sources should also be employed in the review and appraisal process with the use of indicators: interviews of older persons; local and national reports; studies and publications; information from government sources, civil society, the private sector and international organizations; and country reports on the progress regarding the MDGs.

With regard to quantitative indicators, for many developing countries age-disaggregated data is negligible. And even where the will exists to gather the data, the infrastructure and funding may not. An element of review in these countries could be mainstreamed into existing governmental and civil society monitoring exercises in related social and economic areas.

The experts and observers were organized in three working groups and assigned the task of reviewing the list of proposed indicators and suggesting methods for gathering, utilizing a participatory approach, relevant information. The results of deliberations of the working groups were incorporated into an updated list of indicators (see Annex II). It should be emphasized that indicators could be used simultaneously, or in parallel, with the participatory assessment.

### ***Agenda item 5 – Consolidation of national findings of review and appraisal at regional and global level***

National monitoring efforts should be coordinated with and supported by regional and global review and appraisal exercises. Regional support to the process is critical, and the United Nations regional commissions should promote and facilitate the sharing and exchange of information and experiences about the review process. Three regional commissions have already organized conferences which enabled Governments to

elaborate regional strategies to promote the implementation of the Madrid International Plan of Action. Regional reviews of implementation should be based on information provided from the grassroots through national reviews and can address areas of common concern and shared interests. The regional commissions and their intergovernmental bodies can promote networking and provide a collective voice to member countries, national committees and other stakeholders. The commissions should assist countries throughout the process of information gathering and exchange, as well as its “distillation” and analysis towards formulation of findings and priorities for future policy action at the regional level.

Several initiatives aimed at coordinating regional implementation efforts, including the review and appraisal process, are already underway in Latin America and the Caribbean, in Europe, in the Arab region as well as in Africa. Within the ECLAC region, an inter-institutional group was created in March 2002, consisting of UNFPA, ILO, IDB, PAHO, ECLAC and UN DESA, programme on ageing. It has been involved in the preparation of the regional implementation strategy for the Madrid Plan and could continue the collaboration following the adoption of the Strategy by the Regional Intergovernmental Conference held on 19-21 November 2003 in Santiago, Chile by providing assistance to countries in the region in their implementation efforts. In the ECE region, cooperation between the UN ECE Secretariat and the European Centre for Social Welfare Policy and Research, with the support of the Government of Austria, is being explored to coordinate the regional review and appraisal exercise. Within the Arab League, a Committee for Older Persons was established in order to facilitate regional convergence of policies on ageing through the promotion of joint programmes and sharing of experiences. In many countries in Africa, where infrastructure and resources are insufficient or non-existent, major barriers exist for the review of the implementation of the Madrid Plan. The African Union, along with the international non-governmental organization HelpAge International, has been playing an important role in closing the gap and coordinating regional efforts to address issues of ageing.

International cooperation will be required to assist some developing countries and countries with economies in transition in their implementation efforts, including the review and appraisal exercise. These could be achieved through financial and technical support for establishing information and data collection institutions, dissemination of best practices, and training of government officials, civil society activists, researchers and professionals involved in monitoring and assessment. UN funds, programmes and specialized agencies should contribute their expertise through their regional and field offices to support the review and appraisal from local to regional level. The International Institute on Ageing, Malta, might wish to consider including the issues related to monitoring of MIPAA in its training workshops. DESA is developing training materials to assist Member States in their capacity building efforts for implementation of the Madrid Plan, including its monitoring, review and appraisal. In addition, DESA and the International Association of Gerontology, together with practitioners in the field of ageing, have developed a Research Agenda on Ageing to support the implementation of the Madrid Plan. In 2003, through a series of regional expert workshops in Chile, Japan, South Africa and Spain, research priorities for regional implementation were identified.