Towards a "society for all ages": meeting the challenge or missing the boat

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It is not by muscle, speed or physical dexterity that great things are achieved, but by reflection, force of character, and judgment; and in these qualities old age is usually not only not poorer, but is even richer. (Marcus Tullius Cicero in Johnson *et al.* 2005, p. 22)

In April 2002 an event of major international significance took place in Madrid. Government representatives of 159 countries came to the capital of Spain to the Second World Assembly on ageing to share ideas and design policy solutions for an ageing world. Wide-ranging discussions held at the Assembly not only focused on numerous facets of the changing age distributions in nations that have multiple social consequences, but also helped to forge an international consensus regarding developing priorities and a way forward in addressing the challenges and opportunities of ageing. This representative intergovernmental body recognised that a significant demographic change was taking place. The rising median age and a shift towards older age due to gains in life expectancy amid decreasing fertility rates, would require appropriate and forward-looking policy responses.

But the Assembly did not stop there: it called for changes in attitudes, practices, and policies at all levels and in all sectors so that the potential of ageing could be fulfilled. The emphasis on the need to harness in full the enormous potential of ageing societies represented a radical policy shift away from the view that ageing was mainly a welfare problem that had dominated national and international policy levels in the 1980s and 1990s. The document produced by the Assembly – the *Madrid international plan of action on ageing and the political declaration* – (the Madrid Plan 2003a) highlighted the largely convergent views of the international community on the need for concerted policy action on all levels to address ageing in a coherent and comprehensive manner. The point of departure was the acknowledgment that ageing represents not only a challenge but a tremendous social achievement and manifestation of human progress. Finally, the commitment made in Madrid to view a "society for all ages" as a major policy goal, along with the specific recommendations put forward, represented a compelling practical framework on how to adjust to an ageing world.

The intergovernmental policy process at the UN usually uses opportunities given by the anniversaries of major policy documents to review and appraise them. The fifth anniversary of the Madrid Assembly was no exception. It not only provided an opportunity for national governments to take stock of what has been achieved since its adoption, but also for

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highlighting some issues that remain on the agenda of building a society for all ages.[1]

Before Madrid: evolution of thinking and approaches

The Madrid Plan, which signified a genuine consensus on ageing, reflected a common stance achieved during the Assembly and represented an outgrowth and a logical continuation of the work on the social dimensions of ageing carried out at the UN during the preceding decades. While some pioneering efforts to address the challenges of ageing were made even in the 1940s, shortly after the inception of the UN,[2] active debates on economic and social consequences of ageing started at the UN only in the 1970s. In 1978 the UN General Assembly passed Resolution 33/52, making a decision to convene the first world assembly devoted to the issues of ageing, with a view to formulating an international plan of action on ageing to address the needs and demands of older persons as well as analyse relationships between population ageing and economic development. Following that decision, the first World Assembly on Ageing was held in Vienna in 1982 and adopted the Vienna International Plan of Action on Ageing – the first international instrument on ageing of its kind (UN 1982). The recommendations of the Vienna Plan and subsequent legal mandates stemming from the UN legislative and consultative bodies, such as the General Assembly, the Economic and Social Council and Commission for Social Development, put a whole gamut of issues about older persons firmly on the international agenda. Impetus was given to intensive intergovernmental processes that resulted in several important benchmark events of international character in the area of ageing, eventually leading to Madrid.[3]

In substantive terms the Vienna Plan endorsed by the 124 countries that participated in the First Assembly identified three priority areas: (a) the sustainability of development in a world where the population is increasing in age; (b) the maintenance of individuals' good health and well-being to an advanced age; and (c) the establishment of an appropriate and supportive environment for all age groups. The overall purpose of the Plan was to act as a catalyst for formulating ageing policy, guiding national and international efforts to do so and aiming at strengthening the capacities of governments and civil society organisations to deal effectively with the ageing of the population. The Vienna Plan produced 62 recommendations for action, addressing a range of sectoral areas such as health and nutrition, protecting elderly consumers, housing and environment, family, social welfare, income security and employment, as well as research, data collection and analysis, and education and training. It was endorsed by the UN General Assembly in 1982 (Resolution 37/51).

As the first comprehensive international instrument on ageing, the Vienna Plan played an important role in raising awareness on ageing issues around the world. After it was adopted several regional plans of action on ageing were adopted, coordinated by the UN regional commissions and directed at analysing the existing situation in the regions, identifying regional priorities for improving the situation of the older persons in forthcoming decades, and putting forward measures and initiatives for the respective governments to consider. By and large, the regional plans recognised that in all regions the increase in the proportion of the population represented by older persons will have economic, social, and political ramifications that have to be addressed and tackled, taking into account the specific situation of the regions and nations.

In 1991, nine years after the endorsement of the Vienna International Plan of Action on Ageing, the UN General Assembly adopted another important and relevant document: the UN *Principles for older persons* (1991), an important benchmark in shaping both the agenda and the approach of international communities to ageing issues and aiming to ensure that the situation of older persons would get priority attention in national policy-making. Governments were encouraged to incorporate the principles into their national programmes whenever possible (Resolution 46/91).

A year later in 1992, the General Assembly designated 1999 as the International Year of Older Persons "in recognition of humanity's demographic coming of age and the premise it holds for maturing attitudes and capabilities in social, economic, cultural and spiritual

undertakings, not least for global peace and development in the next century" (Proclamation on Ageing as contained in the General Assembly resolution 47/5, Annex).

In December 1995 Resolution 50/141 of the General Assembly announced that the theme of the 1999 International Year of Older Persons would be "Towards a society for all ages,"[4] in a clear reference to the theme of society for all put onto the international agenda several months earlier by the outcome documents of the 1995 World Summit for Social Development in Copenhagen. The underlining conceptual framework of a society for all ages contained four interlocking dimensions: the situation of older persons, individual lifelong development, multigenerational relationships, and the interrelationship between populations, ageing and development. This approach was embedded in the recognition that the situation of older persons cannot be considered as a stand-alone issue without giving appropriate attention to the long-term opportunities of ageing. The life-course approach to ageing was also established. The theme of the International Year and respective political message that it carried outlived its narrow time limits and continued to generate positive worldwide responses, attention, and awareness on ageing issues, even when the International Year of Ageing was technically over. (Later the concept of a society for all ages became part and parcel of the Madrid Plan.)

The member states put the notion of a society for all in the context of social integration and its fundamental goals, noting that it embodies a society where "everyone, every individual, each with rights and responsibilities, has an active role to play". By adding the age dimension to the concept of a society for all, member states emphasised the comprehensive and multi-generational nature of such an approach whereby "the generations invest in one another and share in the fruits of that investment, guided by the twin principles of reciprocity and equity" (A/50/114, para. 38) (UN 1995).

While major international summits and conferences by definition represent crucial landmarks in intergovernmental affairs and draw the most attention, the preparatory processes geared at achieving consensus among member states on major issues to be discussed later at the summits are also important. Numerous meetings of a preparatory nature are often required to smooth and narrow differences during negotiations between the participants representing different country groups (for instance, such as the Group of 77 or the EU), and find common ground and acceptable policy formulations. A major step in understanding a whole gamut of issues related to global ageing was made during the process of preparations for the Second World Assembly on Ageing in Madrid and during the Assembly itself. The preparatory process facilitated the exchange of information among academics, non-governmental organisations and policy-makers on the development priorities of a rapidly ageing world, including such major topics as intergenerational equity, social protection, lifelong individual development, active ageing, health and well-being, supportive environments, and many other dimensions. The mandate for the Second Assembly in Madrid was given by the UN General Assembly to be held on the 20th anniversary of the first World Assembly on Ageing held in Vienna in 1982. The Second Assembly had a major task: to review the status of implementations of the recommendations made by the first Assembly and the Vienna Plan, with a view to formulating an International Plan of Action on Ageing 2002, which would include a set of detailed and far-reaching principles, addressing the social, cultural, economic, and demographic realities of the twenty-first century, and according special consideration to the needs and requirements of developing countries.

For almost two years intensive negotiations were held under the auspices of the UN. The comprehensive and detailed draft document that was prepared during the preparatory process reflected a number of central themes of the major UN conferences and summits held in the 1990s. The concerns of older persons were placed in two contexts. The first was that of promoting and protecting all human rights and fundamental freedoms, including the right to development. The second was that of an inclusive society and the need to achieve more sustainable economic and social development. Civil society organisations, including organisations of older persons that were involved in this preparatory process enriched the debate, often broadening the agenda and providing an

impetus for fruitful and goal-oriented discussions. The obvious differences between the member states in their vision and approaches to ageing policies at the beginning of the preparatory process were effectively bridged and hammered out during the negotiations, paving the way for the consensus document. The member states gave their preliminary consent to the draft text of the preparatory committee and it was subsequently unanimously adopted by the Second World Assembly on Ageing, when the outcome document became known officially as the *Madrid international plan of action on ageing*. While, in many ways, as noted above, the Madrid Plan builds upon previous efforts and represents a continuation of work initiated by the international community after the Vienna Plan on Ageing, it also exemplifies an extension and enhancement of the Vienna Plan, taking into account new paradigms of ageing and new realities of international cooperation.

The Madrid Plan: a new strategy on ageing for the twenty-first century

While the Madrid Plan absorbed numerous insights and important provisions from the preceding major conferences, it is linked most closely to the 1995 World Summit on Social Development: "a society for all ages" advocated by the Madrid Plan represented a further elaboration of the concept of the "society for all" put forward by this 1995 World Summit. A comprehensive, highly focused and detailed international document, the Madrid Plan provides the well-thought out basis for policy action, guiding policy formulation and implementation at all levels towards the specific goal of successful adjustment to an ageing world and achieving society for all ages.

The Madrid Plan (UN 2003a) hinges on three core interlinked themes: that a policy approach to ageing should be inseparable from the development agenda, that empowerment of older persons and the full realisation of their rights and potential is crucial if a society for all ages is to be achieved, and that ageing should be considered by societies and policy-makers in a balanced way where opportunities and challenges are equally recognised. The Madrid Plan is a very rich and multifaceted document. For instance, it promotes enhancing the social protection of older persons, including ensuring they have adequate income security and formal and informal support, as well as reducing and preventing their poverty. It upholds the principle of employment opportunities for all older persons who want to work and the elimination of age barriers in the formal labour market, together with any forms of age discrimination. It supports the removal of disincentives to working beyond retirement age, the development of a continuum of high-quality, affordable, and sustainable health and care services. It upholds the notion of ageing in the community with due regard to individual preferences and affordable housing and the promotion of intergenerational solidarity, as well as numerous other themes. Population ageing is seen in the Madrid Plan as a universal and potent force that has the power to shape the future in many respects.

The basic premises, policy objectives, and specific actions outlined in the Madrid Plan are firmly anchored to the ongoing demographic shifts in the world due to the changing population structure and growing demographic share of older persons. The assumptions of the Plan are fully confirmed by present demographic reports. The most recent data compiled by the UN Population Division shows that the number of persons aged 60 and over is expected nearly to triple by 2050: while now one person in every nine is aged 60 years or over, by the year 2050 one out of every five, and in by 2150 one out of every three will be aged 60 years or over (UN 2006a). In absolute terms the number of persons aged 60 years or over is estimated to be 688 million in 2006 and is projected to grow to almost 2 billion by 2050, at which time, for the first time in human history, the population of older persons will be larger than the population of children (0–14 years) (UN 2006a). But the older population is itself ageing. Currently, the "oldest old" segment, namely people aged 80 and over, constitute 13 per cent per cent of the population aged 60 and over, yet projections are that by 2050 about 20 per cent of the older population will be aged 80 years and over. The world has experienced major improvements in longevity. Life expectancy at birth has increased

by 20 years since 1950 to the current level of 66 years. Of those surviving to the age of 60, men can expect to live another 17 years and women an additional 21 years. However, there are still large differences in mortality levels between countries: in the least developed countries men reaching the age of 60 can expect only 15 more years, and women 17 years, while in the more developed regions life expectancy at the age of 60 is 19 years for men and 23 years for women (UN 2006a). As noted in the Madrid Plan, such a profound global transformation has most far-reaching consequences for every aspect of individual, community, national, and international life and every facet of humanity will evolve: social, economic, political, cultural, psychological and spiritual (Para. 3).

Once thought to be an issue and concern only for the developed world, ageing is recognised today as a truly global issue. As mentioned before, one of the key defining features of the Madrid Plan is that it pays particular attention to the situation in developing countries and advocates an integrated approach to ageing and development. The Madrid Plan thus goes a step further than previous intergovernmental efforts. Demographic data and projections confirm that developing countries are facing the consequences of changing population structures in numerous ways, particularly given the fact that, contrary to popular perceptions, the largest gains in life expectancy and longevity have been more pronounced in developing countries, even though the situation varied depending on regions and national circumstances. Incidentally, while the percentage of older persons is currently much higher in the less developed regions, the pace of ageing in developing countries is more rapid, and their transition from a young to an old age structure will occur over a shorter period (UN 2006a).

Ageing thus represents a global challenge, where developed and developing countries are facing its numerous consequences and the need to cope with them. One major difference between the more affluent and less affluent countries is that the former aged gradually and have accumulated more resources to tackle emerging issues in this area, including sustainable social protection systems. Developing countries have to face the multifold consequences of an ageing group that is still largely poor in income per capita terms, while they are pressed to solve numerous other development challenges at the same time.

After the Madrid Assembly it became widely recognised that ageing is not only a social welfare issue, and indeed is not so much a welfare issue but is a broad issue of socio-economic development, it is also an issue of human rights, of participation, and of acknowledging the crucial role that older persons play in society. Reducing poverty – one of the key goals on the international agenda – has a new dimension in the context of ageing, since in many societies poverty among older persons remains high and special efforts need to be introduced to address it. In developing countries the issue of poverty eradication is particularly acute and it is impossible to solve without broad-based development. Integrating ageing into national development through the frameworks of poverty reduction strategy papers and Millennium Development Goals could help to improve the situation of poor and vulnerable older persons.

The Madrid Plan has been conceived as a practical tool to assist policy-makers in focusing on the key priorities associated with individual and population ageing. Member states, however, were keen to ensure that, while understanding the common features of the nature of ageing and the challenges it presents is important and may be useful when joining forces in addressing a common agenda, the Plan should in no way be seen as a "one-size-fits-all" solution. Its recommendations are designed and should be adopted with due regard to the specific circumstances existing at the national level.

The issues of empowerment, protection of rights and dignity of older persons are crucial for a society for all ages. The Plan appeals for older persons to participate fully and effectively in economic, political and social spheres. It encourages societies to give people the opportunity for continued development as individuals throughout their lives by facilitating lifelong learning. An essential precondition for creating an inclusive society for all ages is promoting and protecting all human rights and fundamental freedoms. In inclusive societies older persons can participate as equal partners without suffering discrimination and where their dignity is respected. It is tautologous to observe that combating discrimination based on age is one

of the prerequisites of success in the quest for a society for all ages. At the same time, a balanced yet positive image of ageing is also essential. It is detrimental for a society to present a caricature of older persons as primarily weak, non-productive, and dependent, and as a burden rather then an asset to society. It is impossible to move forward if this stance is not overcome.

Article 10 of the Political Declaration states that "the potential of older persons is a powerful basis for future development. This enables society to rely increasingly on the skills, experience and wisdom of older persons, not only to take the lead in their own betterment but also to participate actively in that of society as a whole". Thus, if older persons represent a great asset, their rights need to be protected. This notion can augment their empowerment.

The Madrid Plan and the ideals of an inclusive society are inseparably linked. The gender aspects of the Plan are particularly important, particularly as member states generally believed that not enough attention was given to this issue in the previous Vienna Plan. Aging and poverty are becoming feminised. Among the oldest age group, there are only 55 older men today for every 100 women (UN 2006a). Thus most older persons today are women, and many of them bear the brunt of the negative effects of development, advanced age, and social prejudice. The feminisation of poverty – a disturbing but ever-present situation in many regions – is growing and older women are enduring abuse and violence. Special attention must be given to these issues and effective strategies must be developed to remedy the situation. Policy-makers should address the feminisation of ageing, given that many of older women, particularly in developing countries are single, illiterate and outside the formal labour force (Mujahid 2006). The living arrangements of older persons are also changing: worldwide, 19 per cent of older women live alone, compared with 8 per cent of older men. Older persons either living alone or in skipped-generation households tend to be an especially disadvantaged group in less developed regions, and it is older women who are most likely to be found in such situations (UN 2005a). But women are affected by this change in the developed world as well. For instance in the affluent USA, at the threshold of the new century 25 per cent of divorced, separated or never married women over the age of 65 lived in poverty (Cogan and Mitchell 2003).

The Madrid Plan introduced a very specific and innovative criterion of success of policy measures about ageing. Success is measured, not in technological or economic terms, but in terms of "social development, the improvement for older persons in quality of life and the sustainability of the various systems, formal and informal, that underpin the quality of well-being throughout the life course" (Madrid Plan, para 14). This emphasis on quality of life and the life course dimension permits the introduction of intergenerational thinking and a more holistic approach to policy-making. Ageing should be viewed as one part of the life course, and not as a momentous condition that can be set apart from other social interactions and trends.

The ambitious goal to incorporate ageing agendas and concerns into national socio-economic strategies and policies – in other words, "mainstreaming ageing" – is one of the key requirements of the successful implementation of the Plan, along with national capacity building.

At the same time the Madrid Plan calls for increased and better coordinated efforts by member states, the UN system and civil society organisations to implement it. The translation of policy design into action, namely effective implementation, is a well-defined but separate goal of the Plan, linking practical work at the national level with international efforts to facilitate national efforts.

The Madrid Plan established three priority directions for specific action on ageing. These are older persons and development, advancing health and well-being into old age, and ensuring an enabling and supportive environment for older persons. This continued with the direction taken in previous UN efforts. But the Madrid Plan went further by broadening the range of issues to be addressed as well as the terrain and scope of its objectives and actions, in attempting to better reflect the intricacies of policy-making and contemporary realities. The priority directions were designed to guide policy formulation and implementation towards the specific goals of successful adjustment to an ageing world. The Plan outlined 18 areas of concern (or priority issues) with 35 specific objectives, accompanied

by 239 specific recommendations for action. The list of concerns and the priority areas is most impressive. For example, under the first priority area, older persons and development, the following topics are considered: active participation in society and development; work and the ageing; rural development, labour force, migration, and urbanisation; access to knowledge, education, and training; intergenerational solidarity; eradication of poverty; income security, social protection, and poverty prevention; emergency situations. Under the second priority direction, advancing health and well-being into old age, the following issues are covered: health promotion and well-being throughout life; universal and equal access to healthcare services; older persons and HIV/AIDS; training of care providers and health professionals; mental health needs of older persons; older persons and disabilities. The third priority direction, ensuring enabling and supportive environments, is geared at covering housing and the living environment; care and support for caregivers; neglect, abuse, and violence; images of ageing.

These recommendations are aimed at giving the Plan as much practical significance as possible, establishing a framework for national action regarding policy and programme design but leaving enough space to incorporate into practical action distinctive concerns that older persons themselves may have in specific country contexts.

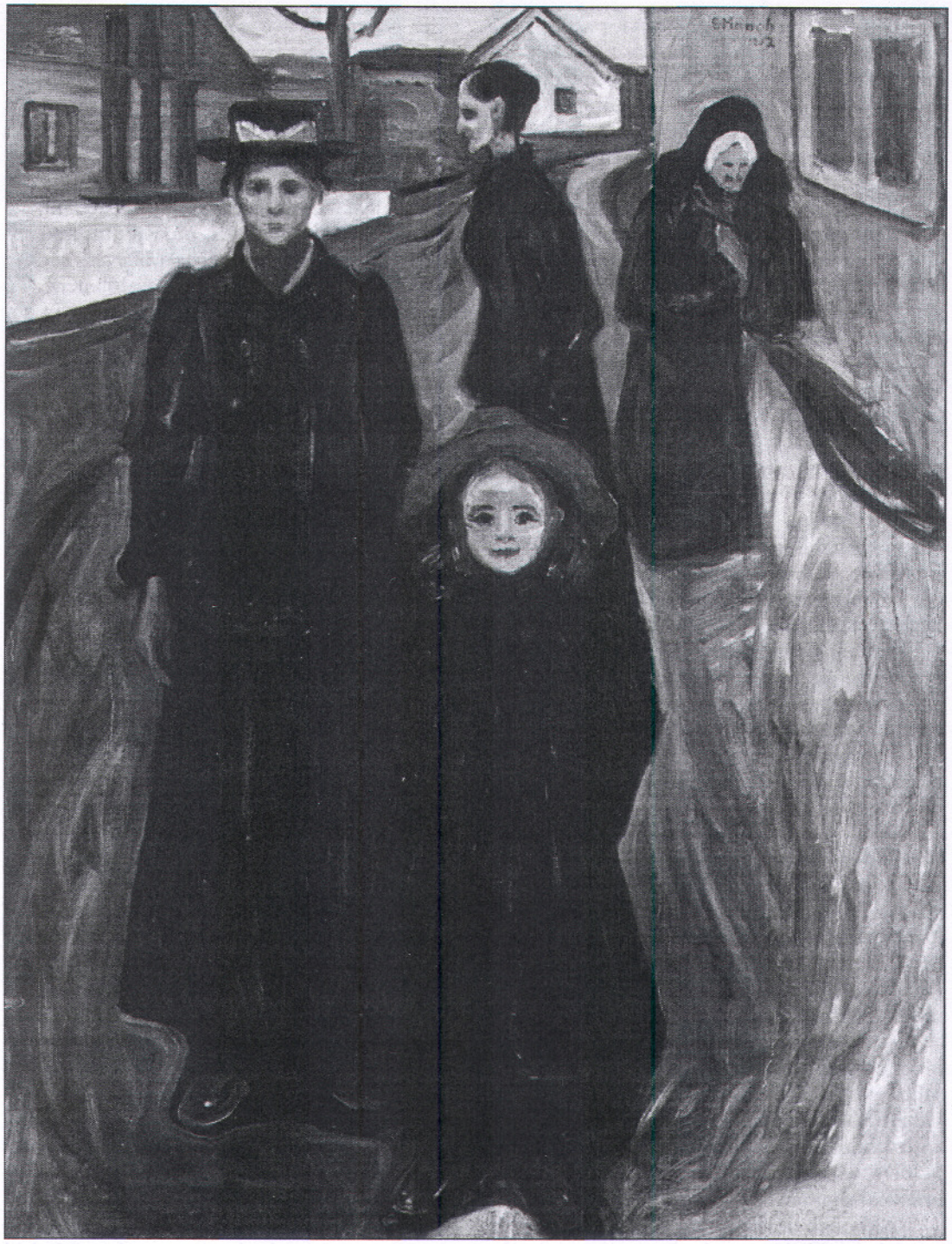
While the target audience of the Madrid Plan is first of all the governments of the member states who, as stated in Article 17 of the Political Declaration, "have the primary responsibility for providing leadership on ageing matters", the Plan is not limited to governments alone. Other stakeholders include international agencies and civil society organisations, particularly those of older persons, as well as the private sector and other entities. The Plan itself was created after numerous consultations among the delegations, with thousands of contributions by stakeholders, with the intention of its having genuine practical significance.

Although intergenerational interaction is crucial, worldwide trends, however, are in the opposite direction. While generations have to co-exist due to increased longevity the desire of different generations to live under the same roof is waning and there is a widespread trend for older persons to live apart from their families. There are still very large differences in this trend, depending on the level of a country's development. For instance, in European countries, an average of 25 per cent of older people reside with a child or grandchild, while in developing countries most (about three-quarters) of older persons live with their children (UN 2005a).

Intergenerational ties, obligations, and solidarity remain at the very heart of every society regardless of the stage of its development. To bring about multigenerational cohesion in society older persons need to be empowered and positive images of ageing need to be promoted. These relationships manifest themselves in different ways, from the intergenerational pact between workers and retirees that forms the basis of many public pension systems created on the "pay-as-you-go" premise, to the family, which provides most of the care for older persons the world over (UN 2001).

Implementation efforts and review and appraisal exercise

As in most UN policy documents, the Madrid Plan established some general directions for translating the principles into both national and international action. While it emphasised that governments were primarily responsible for implementing the broad recommendations of the Madrid Plan, it also recognised the role of "enhanced and focused" international cooperation in its implementation, along with the effective commitment to it of developed countries and international development agencies. Therefore, the Madrid Plan has established two distinct layers in the implementation process – national and international – and specified that the UN Commission for Social Development, which is one of the functional commissions of the UN Economic and Social Council (ECOSOC), will be responsible for following up and appraising its implementation (Madrid Plan, Para. 132). The 45th session of the Commission for Social Development that took place in New York in February 2007 signified the beginning of the review and appraisal cycle



The Four Ages of Life 1902. Oil painting by Edvard Munch (1863–1944). AKG Images

of the Madrid Plan, which will be completed in February 2008 at the 46th session.

The Madrid Plan also highlighted the role of the UN regional commissions in translating the overall provisions of the Plan into their regional action plans as well as in helping national institutions to implement and monitor their actions on ageing.

Following the Second World Assembly on Ageing, three regional commissions have convened intergovernmental conferences and developed regional implementation strategies. These are the Economic Commission for Europe (ECE) in September 2002 in Berlin, the Economic and Social Commission for Asia and the Pacific (ESCAP), also in September 2002 in Shanghai, and the Economic Commission for Latin America and the Caribbean (ECLAC) in November 2005 in Santiago. While the Economic Commission for Africa (ECA) has not elaborated its regional implementation strategy, the heads of state and government of the African Union did adopt the African Union Policy Framework and Plan of Action on Ageing, in Durban, South Africa in July 2002. The Economic and Social Commission for Western Asia (ESCWA) has also not elaborated its regional implementation strategy, but it did adopt the Arab Plan of Action on Ageing to the Year 2012 during the Arab Preparatory Meeting for the Second World Assembly on Ageing, held in Beirut in February 2002. In their conceptual design and content, all these documents cover essential elements on ageing policies that take their cue from the Madrid Plan, at the same time mapping out various ways of coordinating the review and appraisal that is to be done at the regional level. To facilitate the exchange of best practices among governments the regional commissions organised in 2007 the review and appraisal of the Madrid Plan of 2002.[5]

The tools employed by the regional commissions to assist member states differ from country to country, depending on circumstances. Technical assistance is provided, upon the request of countries, in designing national policies on ageing and strengthening national capacity in various areas. Specialised agencies of the UN family and UN funds are used to promote capacity-building at the national level in terms of their mandates and agendas. For example, in its capacity-building efforts the World Health Organisation is strengthening the capacity of participating countries to respond effectively to the healthcare aspects of population ageing, including promoting active ageing. This project is a multi-country study to determine whether countries are moving towards an integrated healthcare system in response to rapid population ageing. The UN Population Fund often combines capacity-development efforts with advocacy. One of its areas is supporting training institutions that deal with ageing and helping to implement legislation on ageing (for more details see UN General Assembly Follow-up to the Second World Assembly on Ageing Report of the Secretary-General dated 22 July 2005, A/60/151 (UN 2005b).

Apart from the regional commissions and specialised agencies and funds, the UN Secretariat in New York, represented by the Department of Economic and Social Affairs (DESA) is another key player in the review and appraisal exercise. The Department of Economic and Social Affairs designated by the Madrid Plan as the focal point on ageing in the United Nations system also supports the intergovernmental process by servicing the Commission for Social Development and advocating ways of mainstreaming ageing globally. DESA also helps the member states in various areas related to ageing and encourages dialogue among the stakeholders.

Linking ageing to the development agenda is one of the key parameters of the Madrid Plan but it cannot be done without building national capacities to implement related policies. National capacities to address ageing challenges vary significantly from country to country. By and large, they reflect national values and priorities attached to older people in national policy-making as well as particular national circumstances, including their demographic context and development trajectories. While it is clear that many countries had ageing-specific policies even before the Madrid Plan was adopted, in numerous cases the Plan played a very useful role as a catalyst of change, bringing ageing concerns into national policy agendas and enhancing awareness. The intergovernmental process linked to the Madrid Plan also helps best practices to be disseminated among member

states regarding policies on ageing, including attending to and recognising the valuable contributions that older persons make to development.

National capacities to implement programmes on ageing cannot be reduced to a single factor. They stem from a combination of factors from various sides of the policy environment as well as the interaction of these factors. Capacity development is based on the national machinery that a country has succeeded in creating, including the ability of people, institutions and societies to "perform functions, solve problems and set and achieve objectives" (Fukuda-Parr *et al.* 2002, p. 8; UN 2006).

It may be quite tricky to assess the national capacity to design realistic policies and carry them through. First of all, as the experience of many countries vividly demonstrates, even the best laid plans are no guarantee that they will be implemented or that their objectives will be achieved. However, national commitments to ageing policies do matter. They provide objective indicators for facilitating the appraisal of a nation's capacity on ageing and its probability of success. After analysing national efforts to develop or strengthen their capacity on ageing, DESA has outlined the essential elements of national capacity development to implement the Plan.

These mutually complementary elements include developing institutional infrastructure and human resources, mobilising financial resources, and initiating research, data collection and analysis (for more details refer to UN General Assembly 2006). All these elements are important in their own right, but the best results are achieved when they are approached holistically and in a comprehensive manner. A vital element of national capacity is a forward-looking policy process that mainstreams ageing into all relevant policies and programmes. Much depends on the ability of a government to be proactive while working in close partnership with other major stakeholders, including the private sector and non-governmental organisations, particularly organisations of older persons or those that represent their interests, to make sure that the concerns of older persons are adequately incorporated into the national programmes and projects.

Apart from establishing ministries, agencies, or national committees to deal with ageing, including specifically appointed national focal points on ageing in government), human resource development and mobilisation of financial resources are needed to develop national capacity. But institutional machinery also matters. Many countries around the world have established government offices on ageing at ministerial levels, such as the Department of Health and Ageing (Australia), the Division of Ageing and Seniors of the Public Health Agency (Canada), the National Committee on Ageing (China), the Federal Ministry for Family Affairs, Senior Citizens, Women and Youth (Germany), and the Administration on Ageing (USA), demonstrating consistency in achieving the goals of age-specific policies (UN General Assembly 2006). This is because it is impossible to achieve results without qualified people who have the abilities and skills to tackle emerging issues in ageing. These may include specialists in gerontology and geriatric health care, providers of palliative health services, and other specialists dealing specifically with older person's needs. This often leads to creating opportunities in the field of education and training, so that specialists schools develop in the issues surrounding older persons and further training is facilitated.

Equally important is mobilising adequate financial resources to implement age-related programmes.[6] The most cost-effective approach could be to build viable alliances between public and private healthcare providers, and create similar alliances for providing housing and transportation for older people. One of the most difficult challenges for many countries to is ensure the sustainability of old-age support.

To implement the Madrid Plan effectively nations need to make an effort to obtain reliable statistics about older persons. Inadequate disaggregated age-related national data often represent a substantial obstacle to policy-making, preventing informed debate and forward-looking decisions on ageing. The UN General Assembly itself, aware that the lack of data disaggregated by age and sex hinders both international and national action on ageing, has asked the Statistical Commission to assist member states to develop ways of disaggregating such data. The progress so far in this area has been modest and much more remains to be done.

One of the most important tasks of DESA is to help national governments to review and

appraise their implementation of the Madrid Plan. The review and appraisal exercise started in February 2007 at the Commission for Social Development and will continue throughout the year up to February 2008. DESA has prepared policy guidelines (UN 2006b) to give governments some practical ideas in designing and conducting their own review and appraisal projects. These guidelines are aimed at the national agencies responsible for developing, implementing and monitoring national policies on ageing, including implementing the Madrid Plan.

The guidelines aim to promote a bottom-up participatory approach, which has been effectively applied by governments and civil society all over the world for much research and policy monitoring. The underlying principle is to permit persons everywhere to age with security and dignity and continue to participate in their societies as citizens with full rights. The publication provides key achievable steps for the review process. These include identifying stakeholders (deciding whom to work with and how), reviewing national policies in response to ageing (defining challenges and priorities for action on ageing and determining what to review, using a bottom-up approach); reviewing the implementation of the Madrid Plan (conducting bottom-up participatory assessments of the impact of policies on older persons); and distilling and analysing information at national, regional and global levels (identifying policy-relevant implications and recommendations).

A national analysis of the implementation of the Madrid Plan hinges on two questions: what has been done at the national level since the Second World Assembly on Ageing, and the impact of this on the quality of life and well-being of older people. This publication was received with much appreciation by member states during the 45th session of the Commission for Social Development. It is expected to lead to discussions between policy-makers and civil society representatives at all levels, with older people present, about the policy-relevant implications and recommendations that emerge. The aim of this bottom-up participatory approach is to involve older persons directly in actions on their behalf, thus promoting their participation in implementing the Madrid Plan. This is intended to empower older persons and ensure that they have an opportunity to express their views on the impact of national policies that affect their lives. The overall goal is to make sure that older persons are not passive bystanders and are not overlooked but are involved in all phases of policy actions on ageing, from policy design to evaluation.

The review and appraisal exercise may highlight the importance of building relations between different government departments, so that ageing policy is truly integrated across all sectors. The Madrid Plan recommends that older people's views and needs are included in national policies in a holistic way (UN 2006b). The participatory review and appraisal of the implementation of the Madrid Plan, if it involves civil society and other stakeholders, may become an example to emulate in assessing whether actions fulfil international commitments and in considering their impact. The social perspective that is embedded in the guidelines can promote sound policy-making by increasing understanding of actual conditions in the country as seen and reflected by the people concerned. The guidelines thus represent a practical attempt to translate research into policy-making and into action as advocated by UNESCO, among other organisations (see in particular the dossier in *ISSJ* 189, 2005). Such methods encourage participation and promote the active involvement of older persons who have often been overlooked in the past. Apart from that, one cannot overestimate the importance of building trust and social capital among older persons that may be an additional benefit of this exercise.

UN DESA wants to help member states build up national capacities regarding ageing policies. It is currently working on a policy guide on implementing the Madrid Plan seeking to promote national capacity development on ageing. This guide outlines ways to develop effective age-specific policies and to mainstream ageing concerns into all aspects of development and policy-making. It covers such areas as promoting a harmonious relationship between development and demographic change; making social protection (including retirement income support) work effectively for older persons; taking account of population ageing in health policy; exploring different aspects of care-giving and the service provision in different settings,

and last, but not the least, ensuring the political inclusion of all older persons. The policy guide for the national implementation of the Madrid Plan will be completed after the preliminary results of the review and appraisal exercise of the Madrid Plan that takes place in 2007–2008.

The way forward

The record of achievements in the area of ageing has so far been mixed at both national and international levels. In part, this can be explained by the varying acuteness of ageing challenges but also by the amount of attention they get. One positive feature is that awareness of the various dimensions of ageing is growing and there is increased understanding of the reasons why older persons are vulnerable – discrimination against them and their exclusion and lack of social protection, people are beginning to understand the way these issues overlap with other development issues, including human rights, participation, and empowerment. To address these challenges, countries have been adopting a broad range of laws that protect the rights of older persons. The need to give older persons a voice of their own is widely recognised but their voices are not heard everywhere. Thus, undeniable national achievements in various ageing-specific sectors co-exist with significantly less progress in mainstreaming ageing into the wider policy discourse and development strategies. This task is apparently not an easy one.

At both national and international levels, there is still a substantial gap between the philosophy of the Madrid Plan and the translation of Madrid commitments into national programmes. Ageing has often not been linked with international development goals. There is still no reference to older generations in many crucial policy documents such as the Millennium Declaration, despite the very clear call from the Second Assembly on Ageing to link ageing to development issues. Ageing thus continues to remain on the periphery of internationally agreed goals and frameworks. As a result, many of the most vulnerable groups in society such as poor old persons remain invisible and are unlikely to benefit from the global effort to eradicate poverty (for more details see HelpAge International 2005).

There is no lack of demographic data and projections for ageing in various segments of the population, including the oldest segment. The older population overall is growing faster today than the total population in all regions of the world. These changes alone make it imperative to integrate older persons into national poverty eradication strategies and efforts to provide them with care. But some basic questions may need to be clarified. Does a specific age – such as 60 or even 65 – represent a realistic contemporary threshold (contrary to a purely statistical approach) for defining a certain population cohort as "older persons" or do other, more flexible, criteria need to be introduced? This question has both methodological and widescale policy implications.

In developing countries the rate of population ageing is accelerating. The old-age dependency ratio could double in 50 years in some developing countries while it took 150–200 years for it to double in developed countries. In developing regions the number of persons aged 60 or over is expected to increase by a factor of four from 2002 to 2050, compared to an increase by a factor of 1.7 in developed regions, but it is not sufficient to say that only the numbers require attention of the developing countries. In addition, many of these countries have to tackle population ageing in very different circumstances compared to the more developed regions. They face acute challenges associated with ongoing urbanisation and industrialisation that are interrelated with societal shifts in contemporary living arrangements and changing family structures.

The UN has been striving to facilitate a developmental response in policies geared to older persons, encouraging member states to consider the issue of ageing in the context of related or parallel events that are taking place in the world. Urgent international response and policy action is required in areas such as conflict prevention, migration, health threats and so on. For instance, chronic non-communicable diseases are becoming a major health challenge for developing as well as in the developed countries, and are now the major cause of death among older persons. This growing disease burden strains existing healthcare systems and claims

additional resources. The vulnerability of older persons was discussed at length by UNDESA in the 2003 *Report on the world social situation* (UN 2003b) that emphasised that no social group, including older persons, is vulnerable by definition. Vulnerability is a result of a negative combination of various adverse phenomena in society. Overall socio-economic vulnerability as well as issues of social protection should be tackled in a comprehensive way and cannot be ignored in policy formulations.

It sounds like a truism that issues pertaining to any social group cannot be dealt with except in a holistic manner, but unfortunately nations have not always done this and their efforts remain fragmented. Integrated intersectoral policies on ageing are still an exception rather than the rule. While each social issue pertinent to older persons may have its own unique characteristics, a comprehensive approach is required to deal with the complete picture. Many problems faced by this age group may superficially seem to belong to different social realms but in practice they are often primarily political and solutions require political will and concerted national action organised on the basis of social solidarity.

When policy measures regarding specific groups are put into practice and implemented, their effect may easily reach beyond their intended boundaries. There is also inevitably a trade-off between various policy goals due to limited resources. When social policy goals aimed at older persons are incorporated into overall national development plans, this integration may have a positive long-term effect on the well-being of a target group. It is obvious that without the active involvement of the older persons acting together with the younger generations, no country will prosper. The close link between the welfare of social groups and national development points to a practical need for increasing the active participation of various social cohorts in national development efforts. Unfortunately, this is very often not done despite the best of intentions and the existence of sophisticated plans of action.

While national goals often specify that older persons must benefit from protection and social welfare efforts, in the face of competing priorities and resource constraints governments are sometimes unwilling to commit themselves to treating older persons as valued members of society possessing a full range of social rights and entitlements. National plans to satisfy needs of older persons, including specific efforts to empower older persons, and to unleash their potential are often not embedded in an integrated approach and given priority in national policy goals and policy-making. Much remains to be done in this area. Governments have a key role to play in addressing the challenges and opportunities of ageing while the UN has a collective responsibility to facilitate the intergovernmental process, keep an eye on this unprecedented demographic shift, draw attention to its long-term consequences, promote cross-national collaboration and share experiences of successful policy actions on ageing.

The UN DESA report called "Major developments in the area of ageing since the Second World Assembly of Ageing," submitted to the 45th session of the Commission for Social Development in February 2007, brought several key issues to the attention of member states that are essential in reviewing and appraising the Madrid Plan. The facts reveal a very uneven picture at best. There is widespread global inequality in the access to or availability of social protection in old age. Pensions, which are taken for granted in more developed regions, still do not exist in many developing countries. Progress to extend social protection schemes (including such schemes as "social pensions") to old-age recipients remains very modest in most developing countries.

Priority setting remains weak. Older persons' priorities could and should be linked to overall priorities of national development, but often are relegated to a second-class status. Priority goals to eradicate poverty and improve healthcare provision, if they are accompanied by well-focused strategies and practical actions, can clearly improve older persons' standards of living. An ageing-related effort represents a true social challenge and governments in many cases cannot meet that challenge alone without the broad support of society, bringing all stakeholders on board to identify goals and targets and to implement policy. The family, the community and the private sector all have an important role to play if efforts are to be made sustainable and long-lasting. But how often do those key stakeholders act together? What are the modalities for the interaction, what prerequisites are there for successful collaboration among

the key actors and what lessons could be learned from some existing success stories? These questions still need to be answered.

While the costs of social protection in general, and social protection for older persons in particular, are important, financial considerations cannot be viewed in isolation without discussing the social cost to society of the absence of such programmes. The success criteria at the national level are often seen narrowly, however: benefits to society are seen only in the introduction of cost savings in the proposed reforms, particularly regarding social spending in the face of present and future financial constraints. The "wait and see" attitude is not an option either. Governments must act now. They have a vital stake in achieving financial stability and ensuring that age-related programmes will continue to be delivered to future generations. However, considerations based on economic efficiency alone cannot be considered sufficient. In a wider policy discourse when options of social protection are weighted against other policy priorities, these considerations should ideally represent not a goal in itself, but rather a starting point in the quest for solutions based on equity, social justice and protecting the vulnerable.

Financial sustainability, as well as the scope of insurance coverage or the capability to provide non-contributory schemes or social pensions, very much depends on country circumstances. Many countries are experiencing rampant poverty or face budgetary constraints. Others would like to avoid incurring excessive costs along with the moral hazard associated with such schemes. But in the world of today governments cannot walk away from their implicit duty of humane care of the most vulnerable among their citizens. Other budget priorities such as education or health care, as well as defense and servicing foreign debts, often claim the attention of treasuries and governments at large. But policy-makers cannot simply disregard the plight of millions of older persons without adequate income who, without appropriate public support, are condemned to insecurity in old-age, and often to abject poverty as well. Old-age support must be considered a priority in all government plans and programmes.

In economic terms, universal pension coverage is an affordable option for most countries, particularly when it offers benefits equal to the poverty line to all those above a certain age. Moreover, this option claims a relatively insignificant share of GDP – a calculation for 100 developing countries and economies in transition in 2005 demonstrated that in 66 countries the cost would be less than 1 per cent of GDP and in 34 it would be less than 0.5 per cent of GDP (UN 2007a, p. 110). The cost of pensions could be also reduced by applying eligibility criteria a flexible way, as well as using better targeting techniques and means testing (UN 2007a, p. 110). What is crucial is the political will to help older persons: very often, if there is a will there is a way.

Apart from its welfare dimensions, social protection for older persons should be seen in the context of human rights, since the right to social security has been recognised from a global legal perspective as a fundamental societal right to which every person is entitled (Article 22 of the Universal Declaration of Human Rights and Article 9 (Office of the High Commissioner for Human Rights 1996, 1996–2005).

The Madrid Plan is not legally binding on member states and there is no mandatory procedure to monitor its implementation. This implementation can be successfully achieved only when the member states undertake timely and concrete actions, introducing broad-based ageing specific policies and organising careful monitoring and evaluation of programme implementation at the national level with participation of all stakeholders, including older persons themselves.

If international human rights instruments did exist the situation of older persons around the world would improve and the goals of the Madrid Plan for a society for all ages would be attainable. In this context, the time may have come for the UN to adopt a comprehensive international convention on the rights and dignity of older persons, similar to the recently adopted Convention on the Rights of Persons with Disabilities (UN 2007b). A convention of this type, addressing the needs of older persons and ensuring their full, effective and equal enjoyment of all human rights and fundamental freedoms, could be a qualitative step forward on the road to an inclusive society. The new Convention on the Rights of Older Persons , based on equality, non-discrimination, and equal recognition before the law would

not only help protect the rights of older persons but also facilitate and enhance their valuable contributions to society in various fields. But the initiative for any such convention must come from governments as well as from civil society organisations.

The dignity of older persons should not be overlooked in all discussions on ageing. It has long been recognised as a key UN principle for older persons. Human dignity not only has moral connotations but is also a legal principle that stands at the core of all the main human rights texts (Moon and Allen 2006). Whatever roles the dignity of older persons could play in society, whether as a value, a principle or a right, it could and should be used as an important benchmark and as a true measure of progress in countering stigma, discrimination, and prejudices and enriching the notion of a society for all ages.

Notes

1. This article largely addresses the political and institutional aspects of the intergovernmental process.

2. For example, in 1948 a draft declaration on old-age rights was submitted by Argentina to the UN General Assembly. This was the first initiative to place ageing on the UN agenda. The draft text contained several articles specifically referring to rights in old age to assistance, housing, food, clothing, health care, recreation, and work as well as rights to stability and respect (UN General Assembly Resolution (draft) A/C.3/213, dated 30 September 1948). While the move did not receive sufficient support from the member states and was not adopted, the issue itself was not dropped. Two years later, on the request of the Economic and Social Commission, the UN Secretariat produced a report called *Welfare of the aged: old-age rights* (UN 1950). In fact, this focus on the welfare of the elderly as a social group reflected the great interest in social welfare issues and their interpretation at that time. In 1969 the government of Malta put the topic of ageing on the UN agenda to draw attention to the consequences of population ageing.

3. This process also had substantial institutional implications, shaping the content, outlook and day-to-day activities of the newly created UN programme on ageing, that was entrusted with coordinating the review and appraisal process of the Vienna Plan, along with promoting and monitoring it, and advocacy.

4. Resolution 50/141 of the General Assembly also noted that the term "older persons" should be substituted for the term "the elderly", to conform to the UN *Principles for older persons.*

5. The exact modalities of the regional review and appraisal exercises have not been determined at the time of writing (February 2007) even though the governments of Brazil, China and Spain have offered to host the regional review and appraisal meetings in 2007 in the ECLAC, ESCAP and ECE regions respectively.

6. This is a separate comprehensive theme, since economic consequences of ageing remain one of the most contested and controversial areas of discourse in this field. Although the financial issues, including perspectives on social protection or social security funding, labour supply issues, and savings and taxation options, are important, they are not, however, the subject of this article.

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