

FOLLOW – UP
to the
UNECE – REGIONAL IMPLEMENTATION STRATEGY
FOR THE
MADRID INTERNATIONAL PLAN OF ACTION ON AGEING

in collaboration between
the Government of the Republic of Austria,
the UNECE Secretariat and the
European Centre for Social Welfare Policy and Research

REPORT
to the
ECONOMIC COMMISSION FOR EUROPE

Sixtieth Annual Session
Geneva, 22 –25 February 2005

ITEM 8: Achieving the internationally agreed development goals, including those contained in the Millennium Declaration, as well as implementing the outcomes of the major United Nations conferences and summits

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1. From Madrid to Berlin

In 1982 a first World Assembly on Ageing was held in Vienna, Austria, and a first International Plan of Action on Ageing was adopted.

10 years after the Vienna Conference, the General Assembly, in its Resolution 47/5, proclaimed the year 1999 the “International Year of Older Persons”. In that International Year the General Assembly accepted with thanks the offer coming from Spain, to organize in 2002 a second World Assembly on Ageing, as well as Germany’s offer to host the UNECE Ministerial Conference on Ageing. (see: A.RES/54/262)

Political Declaration and Madrid International Plan of Action on Ageing 2002:

At the closing of the Second World Assembly on Ageing (Madrid, 8 to 12 April 2002) Governments’ Representatives from all over the world set out the blueprint for an international response to the opportunities and challenges of the ageing populations in the 21st century and the promotion of the concept of a society for all ages.

Responding to growing concern over the speed and scale of global ageing, the Assembly adopted a **Political Declaration** as well as the **Madrid International Plan of Action on Ageing 2002 (UN Doc. A/CONF.197/9)**, which committed governments to act to meet the challenge of ageing populations and provided the world policy makers with a set of 117 concrete recommendations.

As the demographic changes were expected to be greatest and most rapid in developing countries, where the older population is expected to quadruple by 2050, in 2002 the Assembly recognized the importance of placing ageing in the context of strategies for the eradication of poverty, as well as efforts to achieve full participation of all developing countries in the world economy.

Consequently, the 117 recommendations covered three main priority directions:

- older persons and development
- advancing health and well-being into old age
- ensuring enabling and supportive environments.

Further, the texts promoted a new recognition that ageing was not simply an issue of social security and welfare but of overall development and economic policy. The need to promote a positive approach to ageing and to overcome the negative stereotypes associated with it was also stressed.

In order to ensure that ageing had a basic place in all development agenda, governments committed themselves to the full protection and promotion of human rights and fundamental freedoms, recognizing that persons, as they age, should enjoy a life of fulfilment, health, security and active participation in economic, social, cultural and political life.

There are a number of central themes running through the International Plan of Action on Ageing 2002, linked to the goal to improve the economic and social conditions of older persons, in order to enable them to contribute fully and benefit equally from development.

These include, inter alia:

- a) The full realization of all human rights and fundamental freedoms of all older persons
- b) The achievement of secure ageing, which involves reaffirming the goal of eradicating poverty in old age and building on the UN Principles for Older Persons (adopted by the General Assembly in 1991)
- c) Empowerment of older persons to fully and effectively participate in the economic, political and social lives of their societies, including through income-generating and voluntary work
- d) Provision of opportunities for individual development, self-fulfilment and well-being throughout life as well as in late life, through, for example, access to lifelong learning and participation in the community
- e) Ensuring the full enjoyment of economic, social and cultural rights, and civil and political rights of persons

But, the Madrid Political Declaration and the International Plan of Action on Ageing 2002 also deal with **implementation and follow-up**:

In the **Political Declaration, Art.17**, the representatives of Governments meeting at the Second World Assembly on Ageing in Madrid stressed that:

“Governments have the primary responsibility for providing leadership on ageing matters and on the implementation of the International Plan of Action on Ageing, 2002, but effective collaboration between national and local Governments, international agencies, older persons themselves and their organizations, other parts of civil society, including non-governmental organisations and the private sector, is essential.”

Government representatives “underline the important role of the United Nations system, including the regional commissions, in assisting the Governments, at their request, in the implementation, follow-up and national monitoring of the International Plan of Action on Ageing 2002, taking into account the differences in economic, social and demographic conditions existing among countries and regions.” (**Art.18**)

In the **International Plan of Action** it says in **para. 114**:

“The implementation of the International Plan of Action on Ageing 2002 will require sustained action at all levels (...). It will require systematic evaluation to respond to new challenges.(...)”

In **para 118** it is stipulated that “Efforts should be made to promote institutional follow-up to the International Plan of Action, including, as appropriate, the establishment of agencies on ageing and national committees.”(...)

Para 128 states: “The UN regional commissions have responsibility for translating the International Plan of Action on Ageing, 2002, into their regional action plans. They should also assist, upon request, national institutions in implementation and monitoring of their actions on ageing. The Economic and Social Council could strengthen the capacity of the regional commissions in this respect. Regional non-governmental organizations should be supported in their efforts to develop networks to promote the International Plan of Action.”

Para 131: “Systematic review of implementation of the International Plan of Action by Member States is essential for its success in improving the quality of life of older persons.(...) Sharing of the outcomes of regular review among Member States would be valuable.”

Para 132: “The Commission for Social Development will be responsible for follow-up and appraisal of the implementation of the International Plan of Action on Ageing, 2002.(...) Reviews and appraisals will be critical for effective follow-up to the Assembly (...).

The ECE Ministerial Conference on Ageing and the Regional Implementation Strategy for the International Plan of Action on Ageing:

The ECE Ministerial Conference on Ageing was convened in accordance with General Assembly Resolutions A/54/24 and A/54/262, and the decision taken at the 55th session of the UNECE as a regional follow-up to the 2nd World Assembly on Ageing. It was organized by the UNECE and hosted by the Government of the Federal Republic of Germany. The Ministerial Conference took place from 11 to 13 September 2002 in Berlin, only five months after the Second World Assembly on Ageing. The Conference was attended by representatives of 50 ECE Member States, representatives of the European Community, the Holy See, as well as representatives of numerous UN departments, specialized agencies, and organisations.

It was the first intergovernmental forum to respond to the call in the International Plan of Action for adoption of regional plans for its implementation.

It is, further, noteworthy that all stakeholders concerned, including non-governmental organizations and other civil society actors contributed actively both to the process leading to the Conference and to the Berlin Conference itself.

In order to achieve a satisfactory implementation process for the International Plan of Action on Ageing 2002 the following steps were taken:

Participation and input by international and interdisciplinary experts ensured that the foundations for the substance and content of a strategy for the ECE region were in place. This provided the basis for the Open Ended Working group of the UNECE member states to reach agreement on a draft text in a process of several working sessions.

The UNECE, recognizing the importance of involving civil society organizations and in particular NGOs in the work leading to the implementation strategy for a Plan of action on ageing that has the objective of building a society for all ages, invited NGO representatives to participate in all the different stages of the preparation process and offered them excellent conditions of representation.

This long-term participation for the first time of non-governmental organisations in all phases of the preparation of the implementation strategy was warmly welcomed by the NGOs, as these arrangements allowed them to make significant contributions to the Regional Implementation Strategy.

They organized themselves to put in place appropriate mechanisms of internal consultation, and national NGO representatives as well as representatives of international NGOs met in a Conference in Frankfurt/Germany (May 2002), to agree on common positions. The final output of this consultation process was a consolidated position paper that could be introduced into the governmental negotiations.

In the **Berlin Ministerial Declaration**, the representatives of the Member States of the UNECE stated that they recognized that the UNECE region was experiencing unprecedented demographic changes and had the highest proportion of older persons. These changes posed multiple challenges but also provided numerous opportunities for their societies.

They welcomed the continual growth in longevity as an important achievement of their societies, and they emphasized the importance of enabling older persons to continue to participate fully in all aspects of life.

The Berlin Ministerial Declaration, further, stressed the importance of an effective follow-up. With the Declaration, the representatives of the UNECE Member States committed their Governments to put into practice a Regional Implementation Strategy and, in the process, to engage in a regional co-operation as the means of strengthening its implementation.

The overall approach of the **Regional Implementation Strategy (RIS)** is holistic and multifaceted, based on the premise that population ageing is one of the most important aspects of demographic changes in the UNECE region. These changes require the society as a whole and all its institutions to adapt to new realities.

The Strategy differs in structure from the Madrid International Plan of Action.

Member States agreed upon an action catalogue comprising ten commitments:

The **10 commitments of RIS** emphasize the importance of mainstreaming ageing into various policy fields, and underscore that policies for different sectors, systems and groups ought to be comprehensive, well coordinated and mutually supportive. Within each of the commitments, specific policy objectives to fulfil it were identified and very concrete recommendations were formulated.

In adopting the RIS for the Madrid International Plan of Action on Ageing 2002, representatives of UNECE Member States adopted the following commitments:

- 1) To mainstream ageing in all policy fields with the aim of bringing societies and economies into harmony with demographic change to achieve a society for all ages;
- 2) To ensure full integration and participation of older persons in society;
- 3) To promote equitable and sustainable economic growth in response to population ageing;
- 4) To adjust social protection systems in response to demographic changes and their social and economic consequences;
- 5) To enable labour markets to respond to the economic and social consequences of population ageing;
- 6) To promote life-long learning and adapt the educational system in order to meet the changing economic, social, and demographic conditions;
- 7) To strive to ensure quality of life at all ages and maintain independent living including health and well-being;
- 8) To mainstream a gender approach in an ageing society;
- 9) To support families that provide care for older persons and promote intergenerational and intra-generational solidarity among their members;

Commitment 10 of the Regional Implementation Strategy deals with promoting the implementation and the follow-up of the RIS through Regional co-operation:

In **par.90** it is stated that “UNECE member States have the primary responsibility for the implementation and follow-up of RIS.”(...)

Par.91 clarifies that this “follow-up process to the RIS will be done by member states at the national level and **within the existing framework of meetings of the UNECE, including as appropriate at its annual session under the item on follow-up to world conferences.**

This would allow the UNECE secretariat to provide government delegations with information on relevant implementation activities within the region. The UNECE secretariat could also

suggest to member states specific priority issues to be analysed in depth and, when appropriate, guidelines for reporting requirements in the follow-up process, to ensure that this follow-up is in line with the overall implementation of the Madrid International Plan of Action on Ageing 2002.”

Position of NGOs involved in the process leading to the adoption of the Ministerial Declaration and the Regional Implementation Strategy (RIS)

In the Ministerial Conference, the NGOs accredited to the Ministerial Conference on Ageing in Berlin criticised, in their final statement, the above mentioned decisions on the follow-up process and expressed their disappointment that the governments in Berlin did not have the courage to opt for an organized, continuous, strong, transparent and participative monitoring process. They pointed out that only strong follow-up and effective monitoring could ensure that the policies, programmes and measures required to implement RIS would actually be developed. NGOs perceive the monitoring process as an indispensable part of the implementation mechanisms targeted specifically at the following aims:

- Monitoring will enable Member States to identify accurately those areas where they can benefit most from mutual support and exchange
- Monitoring provides the opportunity to work together to improve data collection and provision across the Region and to provide better evidence to underpin policy making.
- Monitoring will pinpoint and highlight successful policies and strategies, and will provide explanations of why specific policies are effective and how particular outcomes have been achieved.

NGOs also requested that monitoring should provide quality data, analysis and assessment, leading to additional knowledge and the identification of best practices in order to initiate and support sound and sustainable policy making. (see Annex)

2. The Austrian Initiative

Considering that the ECE Secretariat has limited staff resources to handle these important tasks, Austria forwarded an initiative that was intended to provide technical support to the ECE Secretariat in the follow-up process. Specifically, Austria proposed to Ms Brigita Schmögnerová, Executive Secretary General of ECE, a cooperative venture with the European Centre for Social Welfare Policy and Research in Vienna, a Centre that enjoys legal status of an intergovernmental organisation and has been charged with the following mandate based on an agreement between the Republic of Austria and the United Nations:

Art. II (1): The Centre shall promote cooperation between the governments of the UN European region, public bodies, intergovernmental and other international and non-governmental organizations, as well as the private sector, active in the field of social welfare, with special emphasis on policy and research (...)

(2) The main function of the Centre shall be:

- a) to promote an exchange of experience in the field of social welfare in different regions (...)
- b) to carry out and to foster research, including research projects involving collaboration between the Centre and organizations, national authorities, and other bodies and individuals
- c) to maintain relations with organizations, national authorities, and other bodies and individuals active in the field of social welfare.”

This Austrian initiative led to the signing of a

Memorandum of Understanding between the United Nations Economic Commission for Europe/UNECE and the Government of the Republic of Austria.

In this Memorandum of Understanding the form of the co-operative arrangement of the UNECE Secretariat with the Government of the Republic of Austria, involving the European Centre for Social Welfare Policy and Research, is outlined.

This arrangement, inter alia, provides for:

“a separate unit to be established within the European Centre, with the consent of its Board of Directors, the work programme of which will be drawn up in consultation with a **task force** to be constituted for that purpose, comprising independent recognized experts in different sub-fields of ageing, working for various governmental, non-governmental, international, or other organizations, as well as for the private sector and employee associations. The members of this **task force** will be identified in consultation with the UNECE Secretariat and the Government of the Republic of Austria;
(...)

Specifically, the Centre and its specialized unit will perform the following functions:

- identify, in collaboration with the UNECE, the above-mentioned **task force** and other concerned parties, the priority issues which require more thorough analysis as set forth in Commitment 10 of the Regional Implementation Strategy;
- prepare, in collaboration with the UNECE, a short annual report on implementation measures within the region (...) and furnish it to the UNECE Secretariat for possible discussion at the Commission’s annual sessions;

(...)

As indicated earlier, the follow-up work to be undertaken by the European Centre will benefit from the advice of a task force, all members of which will serve in their personal capacity (...) They will be called upon inter alia to offer guidance and advice on the content and priorities of the follow-up and in drawing the plans for future work. (...)” (see annex)

3. Decisions taken at the UNECE Annual Session in 2003:

(E/2003/37, E/ECE/1406)

Under “Major policy directions of UNECE’s work (Agenda item 5)” it says in Par.46 (...)

“- the focus on implementation was endorsed

- the role of UNECE in assisting countries in monitoring and assessment of progress in implementing objectives of those global conferences relevant to the UNECE mandate was underlined;”

Under Agenda Item 7:

Follow-up to the Ministerial Conference on Ageing, Berlin:

Par.53:

“- Participation in the follow-up to Berlin should be within UNECE’s existing mandate and resources and draw on UNECE’s recognized expertise, however without establishing a new separate area of programme activities;

- Follow-up should be properly structured and focus on mainstreaming of ageing policy into existing structures and programme of work;

- Coordination with other relevant organizations should be ensured;

- In regard to follow-up to Berlin, UNECE should play an active role in networking, facilitating information exchange, through seminars and round tables and collecting data and preparing analysis, while avoiding duplication with the activities of other organizations;

- The proposed cooperation with the European Centre for Social Welfare Policy and Research, Vienna, was welcomed.

Par.54: In summing up the discussion, the Chair (...) noted that in regard to the follow-up to the Ministerial Conference on Ageing, it is work in progress that needs further discussion with member States, staying within the mandate and expertise of UNECE.”

4. Commission For Social Development - 41st and 42nd sessions

Decisions taken conc. implementation of MIPAA 2002

In 2003 (41st session) as well as in 2004 (42nd session) the Commission for Social Development dealt with the modalities for the review and appraisal of the Madrid International Plan of Action on Ageing, 2002 (E/CN.5/2003/L.7 and E/CN.5/2004/L.7, respectively).

In both draft resolutions all actors at all levels, as appropriate, were invited to participate in the implementation of and the follow-up to the Madrid Plan of Action.

In 2003 (**41st session**) it was, further, stated:

The Economic and Social Council (...)

“2. Invites the United Nations system to consider mainstreaming ageing issues into their work plans;

3. Invites Member States and other stakeholders to mainstream ageing in the design and implementation of their policies and programmes;

4. Invites Governments as well as the United Nations system and civil society to participate in a “bottom-up” approach to the review and appraisal of the Plan of Action, through, inter alia, sharing of ideas, data collection and best practices; (...)”

In 2004 (42nd session) it was said:

“The Commission for Social Development (...)

2. Decides to undertake the review and appraisal of the Madrid Plan of Action every five years, with each review and appraisal cycle to focus on one of the priority directions identified in the Madrid Plan of Action;

3. Encourages Member States to establish or strengthen, as appropriate, a national coordinating body or mechanism aimed at facilitating the implementation, including its review and appraisal of and dissemination of information about the Madrid Plan of Action;

(...)

7. Requests the United Nations regional commissions, within their mandates, to promote and facilitate the implementation, review and appraisal of and dissemination of information about the Madrid Plan of Action at the regional level, inter alia, by assisting national institutions, at their request, in implementation and monitoring of their actions on ageing (...)

5. UN General Assembly Fifty-ninth session

Item 97 of the provisional agenda:

Follow-up to the Second World Assembly on Ageing – Report of the Secretary-General

A/59/164, 21 July 2004

This report provides information on the efforts and activities of the Secretariat and the funds, programmes and specialized agencies of the United Nations system, as well as major international non-governmental organizations on ageing, to implement the Madrid International Plan of Action on Ageing, 2002.

It stresses in its introduction chapter the “need for action at the national and international levels to implement the Plan of Action, including setting national and international priorities and selecting appropriate approaches to ensure that countries achieve a society for all ages”.(1.)

(...) The General Assembly, in its resolution 58/134, “... also welcomed the progress made by some of the regional commissions in implementing the objectives and recommendations of the Plan of Action (...) (2)

Under the heading “Implementation of the Madrid International Plan of Action on Ageing, 2002, B. Support for national action” the Report of the Secretary General says:

“13. The Economic Commission for Europe (ECE) offers technical assistance to those of its Member States that request it, within the framework of the Ministerial Conference on Ageing, and as part of a collaborative arrangement with the European Centre for Social Welfare Policy and Research.”

Under D. Regional action, the Secretary-General’s report gave information on the follow-up to the ministerial conference on ageing in Berlin, and on the memorandum of understanding signed by ECE and the Government of Austria (see above).

There was, further, information given about the workshop on “Sustainable economic and social policies in ageing societies: indicators for effective policy-making”, organized in cooperation with the Institute of Migration and Social Services of the Spanish Ministry of Labour and Social Affairs (see below). And it was stated that “further policy-oriented workshops and seminars are planned. A task force was established to offer the research institute guidance and advice on the content and priorities of the follow-up.” (par.48)

III Review and Appraisal:

“55. The Commission for Social Development (...) decided to undertake the review and appraisal of the Plan of Action every five years, with each review and appraisal cycle to focus on one of the priorities identified in the Plan of Action.” (see above).

6. Task Force

The Task Force is composed of independent recognized experts in different sub-fields of ageing, working for various governmental institutions, non-governmental international organisations, academics and research institutions as well as from Special Agencies of the UN System.

It is expected to advise the Monitoring Unit with regard to their work programme during the whole period of its activity. All members of the Task Force serve in their personal capacity and offer their services on a pro bono basis. They will be called upon inter alia to offer guidance and advice on the content and priorities of the follow-up and in drawing the plans for future work.

Meetings of the Task Force are called as needed, with two meetings planned for the first year of their activity, 2004. The members of the Task Force have to seek support from their respective institutions in terms of working time and travel costs.

First Meeting of the Task Force, Madrid, 13-14 April 2004:

The first meeting of the Task Force was held in Madrid on invitation of the then Secretary of State for the Family and Generations of Austria, Mrs. Ursula Haubner, with the support of the former Spanish Ministry of Labour and Social Affairs.

Thematic Session 1: Regional Implementation of the Madrid International Plan of Action on Ageing- the UNECE strategy

Detailed information was given on the mandates for the implementation of the Regional Implementation Strategy, the functions of the Task Force and the role of the European Centre according to the Memorandum of Understanding between the United Nations Economic Commission for Europe UNECE, and the Government of the Republic of Austria (see above).

The profound dissatisfaction of the NGOs with the non commitment of Member States concerning strong continuous participatory and transparent monitoring was stressed and it was pointed out that an implementation strategy without adequate monitoring lost its value. The Austrian initiative had created new opportunities which NGOs have agreed to support vigorously. NGOs were striving for inclusive societies and not only for caring societies.

As to priority themes for monitoring the Regional Implementation Strategy (RIS), the following areas were suggested:

- 1) mainstreaming the issue of a Society For All Ages in all policies,
- 2) improving the image and the perception of older persons in society,
- 3) combating all forms of discrimination of older persons,
- 4) creating new opportunities for older persons and giving them real choices,
- 5) implementing meaningful and effective participatory mechanisms for older persons to decide on issues of concern and importance for them.

The role of the United Nations system and the regional commissions in the implementation, follow-up and national monitoring of the MIPAA was highlighted.

UNECE's mandate in the follow up to the Berlin Ministerial Conference on aging was explained: although the UNECE Annual Session did not give a direct mandate for the monitoring, this derived from 2 main sources, namely: 1) MIPAA and related General Assembly and ECOSOC Resolutions, and 2) RIS and related decisions of UNECE's Annual Sessions.

The importance of monitoring at the national, regional and global levels was emphasized, the relevant resolutions and decisions taken in various UN fora were mentioned .

The proposed bottom-up approach was mentioned, emphasising the need to empower the people concerned. It was suggested to develop indicators for effective participation. Furthermore, it was pointed out that rather than monitoring commitment by commitment, it was important to take a holistic approach in order to ensure getting the full picture of progress achieved by policies and strategies.

The need of ensuring that the recommendations of MIPAA and RIS reach the people at the local level so as to create awareness, knowledge, concern and commitment of what is at stake was emphasized.

Thematic Session 2: From the mandate to the implementation: strategic and operational concepts.

The major instruments of implementing the mandate of the European Centre in the follow-up and monitoring process for RIS, were named: networking, data collection, analysis, guidance and recommendations. Different ways of doing so were proposed, including setting up sustainable and attainable targets for policy makers, developing internationally comparative indicators, measuring sustainable performance by creating benchmarks, concentrating more on outcome rather than on actual policy.

Four levels to promote implementing MIPAA and to mainstream aging at the international level were indicated: 1) facilitating and promoting national level implementation including designing guidelines for policy development and implementation, 2) promoting mainstreaming of aging in cross-sectoral policies, programmes, objectives and priorities at the international level, 3) encouraging and supporting bottom-up review and appraisal of implementation, and, 4) promoting evidence-based policy development, implementation and monitoring.

The importance of distinguishing between instrumental and outcome indicators was stressed and it was pointed out that monitoring implementation was different from evaluation.

Another aspect to take into account was the importance of making use of the existing data, not to create new ones.

Brainstorming Session: Thematic Priorities for Monitoring RIS

The importance of an exchange of experience, of research analysis, identification of priority issues; preparation of annual reports; support for the development of indicators and the facilitation of data exchange was emphasized.

A holistic picture of progress should be obtained, and four different components were suggested: 1) improvement of the image of older persons in society, 2) the creation of new chances and opportunities for older persons, 3) fighting discrimination of older persons, and 4) the promotion of the participatory processes of older persons. Best practice examples in this field not in quantity but in quality should be given, showing how these came about, the strategies and approaches used.

There was a need to understand better how the phenomenon of aging is being mainstreamed in public policies in various countries, and how social cohesion among generations have been and are being affected by the aging process, as well as whether and how the measures linked to active aging are effective or not.

It must be taken into account that priorities could be different in different parts of the UNECE region. While the RIS had laid down objectives, it was up to national governments to lay down their priorities. The main role of the European Centre was rather to point out measures supporting the implementation of RIS, emphasis to be put on promotional work, the monitoring role should be the role of the governments.

There should be awareness of the great heterogeneity of the countries in the region. The main aim should be the improvement of the quality of life of older persons irrespective of the existing heterogeneity. It was pointed out that the Millennium Development Goals while emphasising a number of issues which needed to be dealt with did not specify, in any way, the phenomenon of ageing.

An initial task of the European Centre was to carry out a fact finding exercise to ensure what governments consider as priorities and to see how these priorities were being implemented. It was summed up that the European Centre had 3 important tasks: 1) the establishment of a network and identification of focal points within national governments; 2) coming up with basic indicators, and 3) identification of priorities of action taken by different governments within the region.

Thematic Session 3: Outcome and Future Perspectives

As to Strategy there was consensus that the commitments of RIS were to be the base work for the follow up actions. Cross cutting issues could be formulated in order to assess progress in a holistic manner.

With regard to Methodology the following questions had to be dealt with:

a) what kind of indicators should be developed, b) where does the monitoring process start and end, and c) where does the process of evaluation start and end.

With regard to Priority Issues: what was the priority that needed to be followed. Is first the objective, then the policy, then the indicators? or should the indicators serve to give rise to policy. And what kind of indicators should that be?

With regard to the work of the European Centre the following tasks were stressed once again:

- a) the need of setting up a network of focal points;
- b) the writing of an annual report, and
- c) offering support to Member States to help them improve their policies and strategies for the implementation of RIS.

In order to measure progress it was necessary to start with an assessment of the present situation.

It was mentioned that national focal points should be conceived not only on the grounds of public administration but needed to include civil society, in particular NGOs, as well as research. More than mere monitoring, more than data collection was needed. Evaluation was to serve as a useful guidance for improvement of policies and strategies.

However, there should not be unhelpful country comparisons which might immediately raise strong objections from Member States. Outcomes were important, but it should also be investigated how these outcomes were reached.

A number of cross cutting issues to get a global/holistic view of what was actually happening in society and was achieved by policies could be chosen, such as: solidarity and cohesion between generations, discrimination, and participation.

There was agreement to identifying the governments focal points but these should also serve as a source of information and *in situ* evaluation and hence needed to include a combination of different sources including civil society, academia and experts in the field.

The comparative method as a scientific tool was, however, also important. The importance of evaluation was highlighted, in order to bring about more adequate policies.

Use could be made of already existing national committees of older persons thus ensuring that older persons themselves were given an important role and function in the focal points set up.

The need of making use of different data sets prepared by a number of international organisations was stressed. The European Centre should identify what kind of data sets already exist and how they could be utilised.

It was, further, clarified that Task Force members did not want comparisons among countries but comparisons about trends in meeting the issues . The Centre was to work closely with the UNECE in producing analytical reports which would help Member States ameliorate their implementation of MIPAA. But the Centre was not to act as a rating or ranking agency but rather as a knowledge producer. What was to be done with the information gathered, was for UNECE and the Member States to decide.

As Governments were reluctant to monitoring and certainly would not appreciate country comparisons, the outcome should be the setting up of a set of indicators to help the evaluation of programmes.

Regarding methodology, existing data sets as well as informal resources were to be made use of.

It was concluded that the first phase of the Centre's task was confidence building, so that Member States could develop acceptance for monitoring processes and be more comfortable with the results obtained. As a result governments would look forward to getting results which would help them to improve their own policies and programmes.

2nd Task Force Meeting – Vienna, November 8 and 9, 2004

Thematic Session 1: Follow-up and monitoring of MIPAA – Progress made:

Alexandre Sidorenko presented to the members of the Task Force the **Report of the Secretary-General to the 59th session of the UN General Assembly** (see also above).

He highlighted the following:

Review and Appraisal should be carried out every 5 years, each time to focus on one of the three priority directions of MIPAA, a specific theme for the 1st Review and Appraisal was to be agreed upon.

Review and Appraisal had two dimensions:

- ageing-specific policies, and
- ageing-mainstreaming efforts.

The major format of Review and Appraisal was a bottom-up approach, with complementary approaches such as defining indicators.

Attention was drawn to the fact that, in its resolution 58/134, the Assembly expressed awareness that the **lack of data disaggregated by age and sex** was an impediment to the consideration of ageing issues and the situation of older persons at both the international and the national levels. The Assembly, in the same resolution, requested the Statistical Commission to assist Member States in developing modalities for disaggregating data by sex and age.

The so-called **Road Map for Implementation** sees two sets of action:

- National Action, comprising capacity-building as well as mainstreaming ageing into national development agenda
- International Action, i.e. mainstreaming ageing into international development efforts.

Some examples of support for national action coming from the UN were given:

- UN DESA Programme on Ageing : A programme for the provision of technical cooperation to assist Member States to implement MIPAA was launched during the interregional consultative meeting on national implementation of MIPAA, hosted by the Government of Austria (Vienna, 9 to 11 December, 2003)
- UNFPA focuses on making advocacy and capacity-building on population ageing the components of country programmes.
- ILO: Focus on the provision of country-specific advisory services in the field of social protection, on sustainability and performance of social protection schemes and their extension to larger parts of the population, on training, statistics, and research.
- FAO focuses on assisting agricultural policy makers in anticipating the effects of ageing on the rural sector and develop appropriate policy responses.
- WHO endeavours to strengthen the capacity of participating countries to respond effectively to the health-care aspects of population ageing.

Further, a wide range of international action was listed, carried out by UN DESA (Programme on Ageing, Population Division, Statistics Division), the UN Department of Public Information, UN HABITAT, UNDP, UNFPA, ILO, etc...

Finally, an overview of regional action carried out in view of implementing the Plan of Action on Ageing was given.

Considering the fact that in parallel to RIS in the UNECE Region, the Shanghai Implementation Strategy was adopted in the UNESCAP Region, it was considered useful to enrich the debate with an exchange of experience between the two regions.

Consequently, Ms Thelma Kay, Chief, Emerging Social Issues Division, UN ESCAP presented the **Shanghai Implementation Strategy: Aims, Strategies and Progress**. She highlighted some important features typical for the ESCAP region:

- speed of population ageing is much faster in Asia than in the ECE region
- the more developed Asian countries are better equipped to face challenges of ageing, but many developing countries have to face the problem without a cushion of affluence
- developing countries have the double burden of an increasing number of older persons and a high number of young persons.

The Shanghai Implementation Strategy for MIPAA and the Macao Plan of Action are based on the results of a regional survey on ageing (June 2002), reflect trends and priorities in the region, provide guidelines on implementation of commitments under MIPAA, and define 4 major areas for action, the 3 MIPAA areas and “implementation and follow-up” as a 4th area.

Further, the conclusions of the Workshop on “Sustainable Ageing Societies: Indicators for Effective Policy-Making” were presented. See separate chapter below.

Nikolai Botev, UNECE Secretariat, Economic Analysis Division, briefed the members of the task force on two inter-related activities undertaken by the UNECE Secretariat as part of its work on the follow-up to the Berlin Conference:

- (a) the survey of national follow-up to MiCA, and
- (b) the efforts to establish a network of national focal points.

He explained that in accordance with the plans for follow-up work, UNECE’s Executive Secretary Mme Brigita Schmögnerová had written to the ambassadors of UNECE member States, asking the relevant authorities in their governments to consider identifying **focal points** for the follow-up to the Ministerial Conference on Ageing. That letter was accompanied by a questionnaire on the national follow-up to the Ministerial Conference on Ageing. The letter invited member States to communicate the name of the focal point and to return the completed **questionnaire** by 30 November 2004. Mr Botev indicated that the UNECE Secretariat would keep the task force members informed of the outcome of these activities.

An overview of **follow-up activities by NGOs** was presented:

Information was given about activities on the international level, i.e. carried out by the NGO Committees on Ageing in New York, Geneva, and Vienna since 2002, by the International Federation on Ageing, HelpAge International, International Longevity Centre, etc..., by regional NGOs such as European Federation of Older Persons/EURAG, as well as on the national level. To get an overview of what effect the World Assembly on Ageing 2002 as well as the ECE Ministerial Conference had on the national level in the ECE member countries, a first short questionnaire was sent out to national contacts/NGOs early in 2003, a list of answers coming from ECE member countries in East and West was presented. It is planned to repeat this exercise on a regular basis in order to get some feedback from the grassroots level regarding development of age policies in their respective countries.

In Thematic Session 2, “Preparation of the Annual Session of the Economic Commission of Europe, Geneva, February 2005”

Nikolai Botev spoke about the **procedure of reporting** on the follow-up work to the upcoming Annual Session of the UNECE. He explained that following a decision taken at the last ad-hoc meeting of the Commission, reporting on national and regional conferences will be done under a new agenda item: “Progress towards the attainment of internationally agreed development goals”. The UNECE Secretariat is in the process of settling the modalities of reporting under the new agenda item.

In the **Brainstorming Session on “Priority issues: options for a proposal to the Annual Session”** several outstanding experts made high quality introductions to three optional themes that could be chosen as priority issues as stipulated in RIS Commitment 10 (par.91). Introductions were made covering the following topics:

- 1 – To adjust Social Protection Systems in Response to the Demographic Transformation in the ECE Member States
- 2 – To enable Labour Markets to Respond to the Economic and Social Consequences of Population Ageing
- 3 – To ensure Quality of Life at all ages and maintain independent living including health and well-being.

A full report of the 2nd meeting of the Task Force will be available within short.

It was agreed to have the 3rd meeting of the Task Force in Spring 2005 in Malta, in connection with a Workshop on “Care Provision in Ageing Societies” (see under “Future Activities”).

7. First Technical Workshop

“Sustainable Ageing Societies: Indicators for Effective Policy - Making”

Madrid, 14-16 April 2004

Organized by the European Centre for Social Welfare Policy and Research in collaboration with the UNECE

Introduction

1. Within the context of the follow-up to the UNECE Ministerial Conference on Ageing (Berlin, September 2002), the Spanish Ministry of Social Affairs, through the Institute of Migration and Social Services (IMSERSO) hosted the first technical Workshop in Madrid. The main aim of the workshop was the discussion of meaningful and feasible indicators. After a short introduction on the demographic process, the workshop focused on three broad areas along with Commitments 1, 3, 4 and 5 of the Regional Implementation Strategy (RIS) for the Madrid International Plan of Action on Ageing 2002 (MIPAA), which was adopted by the Ministerial Conference: income and well-being of the older persons; social security and financial sustainability; and labour market issues. Based on this workshop’s outcome, a set of indicators is going to be proposed to policy-makers, in order to allow them to systematically monitor the implementation of active and sustainable ageing policies while mainstreaming ageing in all policy areas.

2. The workshop brought together some of the foremost experts in the field of ageing involved in research and policy advice, representing different perspectives on and approaches to the issues discussed. Staff of international organizations active in the field of ageing, as well as observers from UNECE member states also attended. The list of participants is attached to the report as Annex 3.

3. Mr. A. Fernandez Lopez, Coordinator for International Affairs at IMSERSO, Mr. M. Macura, Chief PAU/EAD, and Mr. B. Marin, Executive Director of the European Centre for Social Welfare Policy and Research, welcomed the participants and delivered an opening statement.

4. An introductory session was held to set up the framework. Mrs. E. Hönigsperger, Adviser to the State Secretary at the Austrian Federal Ministry for Social Security, Generations and Consumption, presented the Task Force which had been set up just before the technical workshop, and summarized its major recommendations. Mr. M. Macura addressed three main points: the Berlin Conference, its follow-up, and the objectives of the workshop. Finally, Mr. A. Sidorenko, Senior Social Affairs Officer at the UN Focal Point on Ageing, sketched out the general modalities of the review and appraisal process of the MIPAA.

Organization of the Workshop

5. The technical debates were organized as a series of plenary sessions. Three thematic sessions took place, following a demographic introduction. These were: a two-part session on individual well-being and healthy ageing; a second session on sustainability of social security schemes and pension systems; and the third addressed the labour markets and the economic activities of older and younger persons. The chairs of these three thematic sessions were respectively Mr. D. Stanton, Mrs. A. Chlon and Mr. N. Botev, and Mr. D. Wise.

6. The objective was to propose a “minimum set of indicators”, that may be supplemented by additional ones, according to resources available and access to data. These indicators should ideally be gendered, compare old age with other age categories, and distinguish very old people from the not so old persons. They can also be country-specific, given the different countries’ needs and experiences. Demographic indicators are intended as basic tools for the other domains, too.

Debates Around the Four Main Themes

A. Demographic background

7. Our societies are affected by a more or less advanced ageing process. The Centenarian Doubling Time is but one striking illustration of this: in the 1960s in a country like France, for example, the number of centenarians doubled every 10 years, while it is now doubling every 5 or 6 years. But beyond this essential trend, we cannot think of “old age” as a homogeneous and stable category. Neither geographically, nor over time. Neither from an epidemiological point of view, nor from a social security one. Individual health has improved but still the disability-free life expectancy, or DFLE, is not increasing at the same pace in all countries, sometimes even decreasing. Moreover, the relative evolution of life expectancy

(LE) and DFLE, which signals the improvement of health in old age, varies considerably across countries. Consequently, when the labour market-entering generation born 1975-1995 is 65, in a country like Austria they will have a residual LE of over 22 years for men and more than 26 years for women. Most of them will retire quite healthy and premature death will become an ever more rare phenomenon.

8. From a technical point of view, some commonly-used benchmarks and indicators, it was suggested, should not to be used anymore, while others should be refined. For instance, indicators on the length of life should not only measure LE at birth, but also at ages 65 and 80. With regards to the labour market issues, indicators of LE at effective and statutory retirement ages would be meaningful. The importance of cohort-based approaches was also underlined. The demographic dependency ratio was subject to discussion: some participants argue that this ratio should start at birth to give a better overview of the situation, while others plead for a focus on the relevant age groups; in other words, they argue that demographic indicators should be based on those transfers with policy relevance in particular from the demographic standpoint (e.g. given the necessity to analyse the effects of pension reforms). General indicators on living arrangements could be part of an extended indicators' set. In addition, health indicators should be included, as well as health expectancies. Finally, it was suggested to decompose the ageing effect in order to distinguish between its sources, the Baby Boom, the decreasing fertility trend, and the increasing longevity trend. This decomposition is needed to provide policy options specific to their different implications.

B. Individual well-being, wealth and income

9. An essential practical problem is, of course, to be able to integrate the different suggested indicators. Nevertheless, many contributors put forward key criteria in order to set up useful and meaningful indicators, regarding well-being issues as well as all the other themes. These identified key criteria are: consistency, comparability, robustness, clear meaning and acceptance, policy relevance and flexibility; besides, indicators should be relatively easy to compute on the basis of existing data. Participants also emphasized that country comparisons should not be the primary objective, but instead other forms of comparisons, i.e. comparisons against clearly-set policy goals, or short- and long-term comparisons.

10. More precisely related to this thematic session, a general consensus was reached on the fact that income distribution indicators should deal with the household income of the older persons, and should enable one to assess not only how the income of the older people compares to the rest of the population, and to their previous income in life, but also how it is distributed within the old age groups; which packages mainly determine its composition; and to which extent the very old are worse-off than the younger old. Generally, these indicators should be broken down by gender, age groups and age cohorts.

C. Financial stability from a fiscal perspective

11. The general discussion around the Generational Accounting method opposed the following two perspectives. The first stated that social security issues should not be considered separately from the overall fiscal sustainability of public expenditure, because of the arbitrary definitions of taxes and transfers. The second argued that it can be useful for people to do such analyses and that looking at the entire burden of the government would be very interesting but also very difficult from the perspective of modelling techniques.

12. The concept of generosity also raised a lot of comments about the alternative meanings of “generosity” and the fact that potential solidarity may depend on country-specific features, such as cultural characteristics. More generally, greater importance should be given to the generational balance issue, making for significantly more intergenerational solidarity and equity than currently at work in many UNECE countries.

13. Projections were used in many contributions, especially on social security issues. It was suggested that a lot of complementary hypotheses could be added to the standard projections and also that projections often do not take into account the measures and reforms that have already been implemented, whose effect will only be visible in 30-40 years, i.e. it will take one or two generations. But it was also pointed out that the very fact that pension reforms do take decades to actually have an impact, means that researchers are forced to make some assumptions about their projections on how things will look like in the next decades. The importance of projections as a political tool was further emphasized, in particular to provide policy-makers with a set of feasible scenarios, and to convince them to take actions, which sometimes requires pessimistic scenarios as well. It is also of particular interest, for example, to analyse how particular patterns in the labour market might affect future incomes.

14. Technically speaking, a unique fixed retirement age, e.g. 65 for all, was viewed by many participants as meaningless; in their view, it would be more relevant to analyse it against the residual life expectancy, survival rates up to age 65 or 75, or even a DFLE. By the same token, simple old-age dependency ratios are said to lead to biased interpretations. The economic dependency rates should be “refined”, to take into account the actual age of retirement, for instance.

15. Some new types of indicators and measures should be developed under this topic. On a macroeconomic level, a measure of the fiscal gap as proposed in the Generational Accounting method was proposed, as well as tax gap indicators used in the Open Method of Coordination on Pensions. Among suggested indicators were measures of the Total Pension Debt (TPD), by pension schemes (including public and private schemes), and a concept of “Resource Transfer Ratio”, i.e. the ratio of total pensions plus publicly funded long-term care and all health costs to GDP or GNP.

16. On a microeconomic level, a cohort dependency ratio (CDR, i.e. the ratio of the pension reciprocity duration to the employment duration, per each cohort) was suggested, as well as various replacement rates (by gender and by wage profiles). Further, social security- as well as labour market- related indicators should show the incentives and disincentives at work, for example, an ongoing strong incentive to early retirement in many countries of the UNECE region, detrimental to the RIS policy concern that future pension systems should be more in line with encouraging people to work longer.

D. Labour markets and labour force participation

17. The incentive issue raised along the previous social security theme concerns also the disability issue. Social protection systems that do not provide incentives for people to get disability pensions at a massive scale, as is currently the case, would be helpful. As in some countries, close to half of the male population or sometimes even the majority of people retire as “invalids”. Consequently, a review of the assessment mechanism is worthwhile. Moreover, policy decisions need to link activation and compensation policies, which would mean, for instance, to facilitate a gradual withdrawal from the labour force, e.g. going from full-time to part-time retirement, and improving life-long learning programmes.

18. As mentioned in the demographic theme, “old age” itself has become quite a variable category. As one of the participants quoted “the threshold for old age has steadily risen, from roughly 60 for men and 65 for women in 1930, to 71 for men and 77 for women in the early 90s...” Hence, there are ever more people aged 65 and more, but there are actually less “elderly” given changing medical and cultural standards. The varying socio-cultural meaning of “age” over time may be approximated by the residual LE at conventional retirement age of 65 or by survival rates up to that age. Across the UNECE region, both proxies vary dramatically, and chronological age differs a lot. This heterogeneity is further reinforced if we look at cohort-specific further LE, within countries and across countries, so that using a unique standard retirement age for countries with highly variable LEs is not a meaningful policy device. Instead, the flexibilization of retirement, as suggested by the RIS, is the only meaningful response to this situation.

19. Some activity and exit patterns indicators were put forward, like the labour force participation rates of older workers and the employment to population ratio (aggregate and for older workers), as well as the activity rate. Use-of-time indicators should be developed, to better assess the needs and resources of older active people. Early exit pathway indicators were also suggested, from the average effective retirement age, the minimum and maximum effective age, to the participation in pre-retirement schemes and the disability rates.

20. Moreover, even though less readily available, many participants pointed out the interest of some innovative indicators to monitor late-exit policies, activation and compensation indicators, such as part-time work rates among older people, improvement of working conditions for the ageing workforce.

E. Some cross-cutting conclusions

21. Hence, regarding all three topics covered, namely individual well-being and healthy ageing, social security and labour markets, the single most important answer to this evolution is to stretch working life to the extent that LE extends as well. More generally, to stretch active life, trying to get rid of “one-size-fits-all” social policies with standardized assumptions about standardized lives and life courses. A sort of “ageing and age-diversity management” of work would be worthwhile, so that older workers can work efficiently for a longer period of time.

22. All thematic sessions also questioned the causal link between specific policies and specific outcomes, and stressed the need to make existing incentives as intelligible as possible to the public, in order to display their possible and desirable effects – for instance, the pension formula “*each month of work counts*”. Hence, suggested indicators should be also informative about the incentive structure at work in different social security systems.

23. The sometimes disappointing impact of well-intended policy interventions also means that we need an integrated, comprehensive approach, with a view to a “Society of All Ages”. First, the interrelations between different policy domains should be kept in mind. For instance, family policies, through their impact on fertility, will, of course, affect the pension and the overall social security systems. As an illustration, the simultaneous expansion of female labour force participation and fertility in the late 1990s in the Nordic countries suggests that labour market policies combined with family policies may play some role. Second, of course, the impact of policy interventions on individual and household – not only monetary – well-being should be monitored. This concern is now commonly shared. One may

note that the Open Method of Coordination has now put forward in this domain as the first common objective, to reach an “Adequacy” of pension systems, i.e. the meeting of social objectives, which in turn requires financial sustainability.

24. To conclude, the emphasized need for integrated approaches and the recurrent concern about the meaning of the term “ageing” are related. Indeed, ageing is now recognized as a process and therefore includes some dynamism and should be placed in an integrated perspective to be taken into account by public policies. In short, there is a generalized and consensual shift from a culture of “old age” towards a culture of “ageing” – at any age.

8. Future Actions:

A – proposal of a specific theme

According to Commitment 10, par. 91, specific priority issues should be identified. It is planned to agree, in a future meeting of the Task Force, on a proposal for a first specific priority issue to be presented to the Economic Commission for Europe at its 61st Session in 2006.

B- 3rd Task Force Meeting, Malta, 17-18 May, 2005

On the agenda will be the discussion on the priority theme, the design of the new web-site “monitoring RIS”, the status of building a network of Focal Points in UNECE member states and establishing a pool of resource persons from NGOs, the results of questionnaire on stakeholders responsible for the implementation of MIPAA and RIS, including actions already taken, furthermore the European research agenda on ageing and a model project on technical support for selected countries in transition to set up structures for the implementation of MIPAA and RIS on the national level.

B – Workshop on long term care in Malta

A workshop on “Care Provision in Ageing Societies: What are the policy challenges and how to address them” is in under preparation in cooperation with INNEA. It is scheduled for 19–21 May 2005 and will be hosted by Malta.

The overall objective of this workshop is to promote the national and regional implementation of the commitments related to care provision as laid down in the Regional Implementation Strategy (RIS) and the Madrid International Plan of Action on Ageing (MIPAA)

The Aims are to:

1 – Revisit the commitments related to care provision in RIS and MIPAA and identify:

- a) priority areas
- b) additional and emerging issues and concerns

2 – Identify

- best practices
- difficulties encountered, and
- major achievements.

3 – Propose indicators aimed at helping national governments to assess how their national and local policies are meeting existing and future needs.

4 – Propose appropriate policy measures to address the challenges related to care provision finding a proper balance between

- care needs of different generations/age groups
- formal and informal care systems
- traditional and emerging forms of care
- welfare state and welfare society ideology (top-down and bottom-up approaches).

It is planned to have a mixture of plenary sessions and working groups, ensuring maximum participation.

Participants should come from different backgrounds, representing different fields (policy makers, civil society, etc.) and geographical balance should be ensured.

C – Website Monitoring RIS

With a view to "scientifically and technically assisting governments in the monitoring of the RIS", collaboration between the Austrian Government, the UN-ECE and the European Centre was laid down in "Memorandum of Understanding" (MoU), specifying the role of the European Centre and its specially set-up Programme "Mainstreaming Ageing - Indicators to Monitor Implementation" (MA-IMI). The first priority is to promote an **exchange of experiences** in the field of ageing-related policies. Second, to carry out and foster **data collection, research and analysis**, including in collaboration with other organizations (in particular UN agencies, ISSA, the European Community, OECD), national authorities, other concerned bodies and individuals. Third, to maintain in this context a **network** of organizations, national authorities, and other concerned bodies and individuals, **active in the field of ageing**.

These tasks will be supported and facilitated by the **creation of a specific website** dedicated to the knowledge and information about the Follow-up of the RIS. In a first step, the website will inform the audience about the political process regarding Mainstreaming Ageing and Monitoring RIS. Furthermore, the site will give an overview of instruments, activities, and resources. The resources include, among others, country facts and figures. In addition, actors are offered a participant network via closed spaces. In a second step, the website will be expanded by databases, related to the second priority mentioned above. Our target - all interested actors, from governmental to local authorities, as well as NGOs partners - will be able to find information dedicated to their needs.

D - Networks

Two forms of networks are to be established.

A – a network of Focal Points, linked to the Governments of ECE member countries

B – a network of national NGOs representing older persons and/or the interests of older persons

9. International Activities

A – Report presented by Alexandre Sidorenko during the 2nd meeting of the Task Force
(see above)

B – Malta Meeting 10-12 November 2003

The UN programme on ageing of the Department of Economic and Social Affairs in cooperation with the International Institute on Ageing (INIA) organized, in November 2003, an Expert Group Meeting on Modalities for Review and Appraisal of the Madrid International Plan of Action on Ageing.

The overall objective of the Meeting was to contribute to the elaboration of the modalities for the review and appraisal of the MIPAA. The meeting was attended by 13 experts from all world regions and 10 observers from Governments and entities of the UN system.

The Agenda of the meeting included the following items:

1 – Dimensions of the review and appraisal: ageing policies and mainstreaming ageing into development policies:

two-pronged approach: monitoring ageing specific policies as well as the extent to which ageing is mainstreamed into development policies.

2 – Content and modalities of a bottom-up approach to national review and appraisal of MIPAA. Role of different stakeholders:

The Commission for Social Development at its 41st session endorsed a bottom-up approach to review and appraise the implementation of MIPAA. 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 were achieved at local, national, sub-regional and regional levels.

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.

3 – Gathering of qualitative information for national review and appraisal of MIPAA:

The essence of the participatory method is to listen to stakeholders. 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.

4 – Indicators and data collection for national monitoring of MIPAA:

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. The Action Plan states that indicators should be linked to issues such as poverty and standards of living, as well as the health status of older persons.

The indicators proposed by the UN Secretariat are formulated on the basis of actions as recommended in MIPAA and aim at assessing the progress in reaching the Plan's objective. Two types of indicators were proposed: instrumental and outcome.

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

National monitoring efforts should be coordinated with and supported by regional and global review and appraisal exercises. Regional support to the process is critical.

The expert group in Malta 2003 suggested participatory assessment tools and indicators for national review and appraisal of the Madrid International Plan of Action on Ageing .

10. Summary

Bearing in mind that the project “Monitoring RIS” has started only one year ago, considerable progress has been made. On the one hand, the technical workshop on “Sustainable Societies: Indicators for Effective Policy Making”, to which outstanding international researchers have contributed, forms a most valuable resource for the definition of appropriate indicators to measure the consequences of policy measures on the national level. On the other, the Task Force has attracted highly respectable experts from governmental level , NGOs, academia and international organisations, adopting a “think tank” function in giving directions to the monitoring exercise.

The outcome of the project after its 5 years duration, will, of course, largely depend on the will of member states and their stakeholders to follow recommendations and to accept technical assistance and tools offered by the three partners , the observatory of the European Centre for Welfare Policies and Social Research in Vienna, the Task force “Monitoring RIS” and the UNECE –Secretariat.





Memorandum of Understanding between the United Nations Economic Commission for Europe / UNECE, and the Government of the Republic of Austria

The UN Economic Commission for Europe (UNECE) will be involved in the follow-up to the Berlin Ministerial Conference on Ageing, in accordance with (a) the mandate given to the United Nations regional commissions by the Madrid International Plan of Action on Ageing 2002 (MIPAA) to translate the Plan into regional action plans and to assist upon request, national institutions in implementation and monitoring of their actions on ageing (MIPAA, para 128); (b) the mandate given specifically to the UNECE by the Regional Implementation Strategy (RIS), which calls upon UNECE “to assist member states upon request with implementing the RIS and in their evaluation of the achievements of the RIS at the national level” (para. 92); and (c) the decisions taken at the Economic Commission for Europe’s 58th session. This will be done in close collaboration with UNECE member States, who have the primary responsibility for the implementation and follow-up of RIS, the civil society at large, and in particular the relevant non-governmental organizations, as well as with other concerned actors, in order to mainstream ageing in an integrated way into socio-economic policies, and to represent the age-specific interests of different age groups, including older persons, so as to promote active ageing, the employability of all persons wishing to work, sustainable income and quality of life for all ages, prevent age discrimination, and foster age diversity, inter-generational equity and solidarity.

The follow-up work will be performed in the spirit of the call in paragraph 131 of MIPAA for systematic review of the implementation of the Plan by the United Nations Member States. It will be sensitive to the wish of UNECE member States to avoid heavy reporting burden, and to have a monitoring process based on effective exchange of information, experiences and best practices that avoids simplistic comparisons.

In this context, the UNECE Secretariat welcomes the initiative of the Government of the Republic of Austria, represented by the Federal Ministry of Social Security, Generations and Consumer protection, to provide technical support to the follow-up process. This initiative was also welcomed by UNECE Member States during the 58th Annual Session of the UNECE. The initiative envisages a co-operative arrangement with the Government of the Republic of Austria, involving the European Centre for Social Welfare Policy and Research, which is a Vienna-based organisation affiliated with the United Nations.

As part of that initiative,

- a separate unit would be established within the European Centre, with the consent of its Board of Directors, the work programme of which will be drawn-up in consultation with a task force to be constituted for that purpose, comprising independent recognized experts in different sub-fields of ageing, working for various governmental, non-governmental, international, or other organizations, as well as for the private sector and employee associations. The members of this task force will be identified in consultation with the UNECE Secretariat and the Government of the Republic of Austria;
- to staff this unit, the European Centre will be enabled by earmarked funds from the Government of the Republic of Austria to recruit at least two additional qualified professionals with international experience. For its part, the UNECE will make available for the follow-up work staff and other resources in accordance with its programme of work, as approved by ECE Member States in the context of the programme budget;
- the European Centre will also make available its infrastructure to support the follow-up work, provided that this support is not detrimental to the fulfilment of the Centre's other responsibilities.
- this initiative is initially planned within a time frame of five years of operation. During the fourth year of the initial five year period, the UNECE together with all stakeholders, including the Government of the Republic of Austria, will evaluate the status of the initiative and recommend whether it should be renewed, extended or scaled-back, or it should be phased-out;
- the European Centre will welcome contributions (in terms of personnel, financial resources, or in kind) from other donors to further boost its capacity to work on the follow up to the Berlin Ministerial Conference on Ageing.

The role of the Centre and its specialized unit will be:

- to promote, in collaboration with the UNECE Secretariat, an exchange of experiences in the field of policies related to ageing;
- to carry out and foster data collection, research and analysis, including in collaboration with other organisations (in particular UN agencies such as WHO and ILO, ISSA, the European Community, OECD), national authorities, and other concerned bodies and individuals;
- to maintain, in the context of the above-mentioned data collection, research and analysis work, a network of organizations, national authorities, and other concerned bodies and individuals, active in the field of ageing;

Specifically, the Centre and its specialized unit will perform the following functions:

- identify, in collaboration with the UNECE, the above-mentioned task force and other concerned parties, the priority issues which require more thorough analysis as set forth in Commitment 10 of the Regional Implementation Strategy;

- prepare, in collaboration with the UNECE, a short annual report on implementation measures within the region, based on the data collected by the two institutions, and furnish it to the UNECE Secretariat for possible discussion at the Commission's annual sessions;
- offer support to the follow-up work by developing and monitoring a set of agreed-upon "indicators of achievement";
- facilitate the collection of data and exchange of information in the field of ageing-related policies, specific laws adopted, best practices introduced by UNECE Member States and relevant activities undertaken by NGOs.

As indicated earlier, the follow-up work to be undertaken by the European Centre will benefit from the advise of a task force, all members of which will serve in their personal capacity, and will offer their services on a *pro bono* basis. They will be called upon *inter alia* to offer guidance and advice on the content and priorities of the follow-up and in drawing the plans for future work. Meetings of the task force will be called as needed. The members of the task force will normally be supported by their institutions in terms of working time, travel and accommodations.

Signed on 01/23/ 2004 in Vienna



For the Government of the Republic of
Austria:



For the United Nations Economic
Commission for Europe:

