



Federal Ministry of Social Affairs
and Consumer Protection

Mainstreaming Ageing: Indicators to Monitor Implementation

**Follow - Up of the
Madrid International Plan of Action on Ageing / MIPAA 2002 and
UNECE Regional Implementation Strategy RIS**

**Conference Room Paper
UNECE 60th Anniversary Session 2007**

Task Force Monitoring RIS

**Paper prepared by the European Centre Vienna
at the request of
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Conference Room Paper for the UNECE 60th Anniversary Session 2007

The Memorandum of Understanding between of the UNECE and the Government of the Republic of Austria signed in 2004 provides for a regular up-date on the Implementation of the UNECE Regional Implementation Strategy (RIS) on Ageing, which was decided at the Ministerial Conference on Ageing in Berlin (September 2002) as a Follow-up to the Madrid International Plan of Action on Ageing. Accordingly, Austria has provided relevant information on the activities during the first year of this project at the 60th Annual Session of the UNECE in February 2005.

The purpose of the present document is to inform the UNECE Member States on the further progress achieved in particular by the Task Force set up for this purpose and the cooperation with the Vienna-based European Centre for Social Welfare Policy and Research. The information provided in this context might also be useful for delegations during the preparation phase of the upcoming Ministerial Conference on Ageing to be held later this year in León (Spain). Therefore, Austria would like to encourage all UNECE Member States to actively participate in the activities of the Task Force, including providing information for the respective Website Monitoring RIS: www.monitoringris.org

Mainstreaming Ageing: Indicators to Monitor Implementation (MA:IMI) by the European Centre Vienna as a Follow - Up of the Madrid International Plan of Action on Ageing / MIPAA 2002 and UNECE Regional Implementation Strategy RIS

Introduction and background

The UN Economic Commission for Europe (UNECE) is 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.

In this context, the UNECE Secretariat welcomed 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 takes place in 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 research organisation affiliated with the United Nations, and the Task Force of experts on the basis of the Memorandum of Understanding between the United Nations Economic Commission for Europe / UNECE and the Government of the Republic of Austria (2003 – 2008) (**Appendix 1**).

1. The European Centre for Social Welfare Policy and Research

The European Centre and its specialized MA:IMI unit performs the following functions:

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

1.1 Preparatory and Conference Phase: 2001 – 2002

A brief history of the project

The European Centre was invited to have its Executive Director serve as the Rapporteur to the Expert Seminar on "Economic Security and Sustainable Growth in an Ageing World", Burgos, Spain, 10-12 September 2001. This meeting, at the invitation of the Spanish Government, was one of three expert seminars in preparation for the Ministerial Conference on Ageing in Berlin (September 2002). During the preparation phase for Berlin, the European Centre also assisted UNECE in the context of the Secretariat Drafting Group and participated in the respective Open-ended Working Group. The Berlin Ministerial Conference adopted the Regional Implementation Strategy (RIS) for the revised International Plan of Action on Ageing (IPAA), which had initially been adopted by the Second World Assembly on Ageing (WAA-2) in Madrid (April 2002).

The UNECE is in charge of supporting the global process of action on Ageing on a regional level. During the pre-conference preparation stage, it

- identified the issues and policy challenges related to ageing that are of particular relevance for the UNECE region;
- made proposals to Member States on the main themes and issues to be addressed by the Conference;
- organised expert seminars to address each of the themes;
- and prepared, during the first half of 2002, a draft of the Regional Implementation Strategy for the revised MIPAA and developed it further by an open-ended working group in July 2002.

The European Centre, through its Executive Director, served as a partner to UNECE based on the Memorandum of Understanding with UNECE and supported by earmarked funding provided by the Austrian Federal Government.

Timeline of the Preparatory and Conference Phase

<p>September 2001 Burgos, Spain Expert Seminar on “Economic Security and Sustainable Growth in an Ageing World”, Report (Rapporteur: Prof Marin)</p>	<p>October 2001 Vienna, Austria Expert Seminar on “Age Integration, the Changing Life Course and Intergenerational Solidarity”</p>	<p>October 2001 Vienna, Austria Start of the Secretariat Drafting Group</p>
<p>November 2001 Geneva, Switzerland OEWG Meeting and Secretariat Drafting Group</p>	<p>December 2001 Geneva, Switzerland OEWG Meeting and Secretariat Drafting Group</p>	<p>April 2002 Madrid, Spain Second World Assembly on Ageing (WAA-II), adopted the Madrid International Plan of Action on Ageing (MIPAA)</p>
<p>April – July 2002 Open-ended Working Group</p>	<p>September 2002 Berlin, Germany, UNECE Ministerial Conference on Ageing (MICA), adopted the Regional Implementation Strategy (RIS) for the MIPAA</p>	

1.2 First Follow-up, Monitoring, Review and Appraisal Cycle: 2003–2008

In this first follow-up phase, the MA:IMI (Mainstreaming Ageing: Indicators to Monitor Implementation) project, an institutionalized collaboration between the European Centre and the UNECE, under the auspices of the Austrian Federal Ministry of Social Security, Generations and Consumer Protection, was laid down in January 2004 in form of a “Memorandum of Understanding”.

Besides the specific mandate given to the European Centre, the Memorandum of Understanding also foresees the establishment by the Austrian Government and the UNECE of a Task Force (see below under 2 for more details) in order to offer guidance and advice with respect to the contents and priorities of the follow-up phase. The European Centre reports on the actual and expected outcome of the project to each of the Task Force meetings.

During the first follow-up phase (5-years):

- The first priority is to promote an exchange of experiences in the field of ageing-related policies.
- The second priority is to carry out and foster data collection, research and analysis, including in collaboration with other organizations (in particular UN agencies, ISSA, the European Commission, OECD), national authorities, other concerned bodies and individuals.
- The third priority is to maintain a network of organizations, national authorities, and other concerned bodies and individuals, active in the field of ageing.

The European Centre also offers support to the follow-up work by developing and monitoring a set of agreed-upon “indicators of achievement”. In this context, Technical Workshops have been organized, in order to discuss and formulate a meaningful and feasible set of indicators.

Each workshop has dealt with various age-related topics, as addressed in the UNECE / RIS. Expert Meetings have also been also organized to discuss further the outcome of these workshops, in order to propose a finalised list of indicators.

The Government of Spain has proposed to host the Conference on Ageing in the UNECE region in Autumn 2007, and this conference will conclude the first five-year cycle of review and appraisal of MIPAA within the UNECE region. Thus, the 2007 UNECE Conference on Ageing will be an important milestone in reviewing the progress since the World Assembly in Madrid and the Ministerial Conference in Berlin. The progress achieved so far will be evaluated with respect to the policy measures adopted by the UNECE Member States and the effect, which these measures have in improving the quality of life of older people.

In preparation to this conference, the UNECE Secretariat has established an Expert Group, which is expected to provide policy advice and expert assistance to the intergovernmental Preparatory Committee of the Conference. Two experts from the European Centre (Bernd Marin and Asghar Zaidi) are currently serving as active members of this Expert Group.

1.3 Timeline of the Follow-up and Monitoring Phase: 2003 – 2008

<p>January 2003 Geneva, Switzerland UN ECE Informal Consultations on the Follow-up to the Berlin Conference</p>	<p>April 2004 Madrid, Spain First Technical Workshop on “Sustainable Ageing Societies: Indicators for Effective Policy-Making”, hosted by IMSERSO</p>	<p>November 2004 Madrid, Spain WAA II Follow-up Meeting “Moving Forwards Implementation of the Madrid International Plan of Action on Ageing – Training of Professionals on Ageing Matters”, organized by IMSERSO</p>
<p>November 2004 Madrid, Spain WAA II Follow-up Meeting “The Contribution of Older Persons to the Social and Economic Development”, organized by IMSERSO</p>	<p>May 2005 Malta Second Technical Workshop on “Care Provision in Ageing Societies: What Are the Policy Challenges and How to Address Them”, co-organized by the UNECE and INIA, in cooperation with IMSERSO</p>	<p>February 2006 Vienna, Austria Expert Meeting on “Madrid Indicators”, hosted by the European Centre</p>
<p>May 2006 Jaén, Spain International Meeting on “The Situation of Ageing 2005 until 2006. Challenges and Good Practices in Numbers”, hosted by IMSERSO</p>	<p>June 2006 Vienna, Austria closed Expert Meeting on Care Indicators, hosted by the European Centre</p>	<p>November 2006 Segovia, Spain UNECE – Focal Point Meeting, hosted by IMSERSO</p>
<p>February 2007 Vienna, Austria Meeting of the Expert Group for the UNECE Conference on Ageing (joint meeting with the Task Force)</p>	<p>July 2007 Geneva, Meeting of the Preparatory Committee for the UNECE Conference on Ageing</p>	<p>November 2007 León, Spain UNECE Conference on Ageing</p>

2. Task Force

The Task Force is composed of independent international experts in different sub-fields of ageing, working for various governmental institutions, non-governmental international organisations, academic and research institutions as well as from specialised agencies of the United Nations. It is expected to advise the Monitoring Unit with regard to the 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 up plans for future work.

Since the establishment of the Task Force, four Meetings and three Workshops have been organized; including a Workshop on “Indicators for Effective Policymaking” (2004, Madrid), a Workshop on “Long-term Care” in Malta (2005) and Copenhagen (2006), and a Workshop on “Care Indicators” in Vienna (2006).

Example A: First Technical Workshop on “Sustainable Ageing Societies: Indicators for Effective Policy-Making”, at the invitation of IMSERSO, 14-16 April 2004, Madrid, Spain

Besides a short introduction on the demographic process, the Workshop focused on three broad areas: (1) income and well-being of the elderly, (2) social security and financial sustainability, and (3) labour market issues.

The workshop brought together a team of prominent international experts in the field of ageing involved in research and policy advice, representing different perspectives on and approaches to the issues discussed. Representatives of international organizations active in the ageing field, as well as observers from UNECE Member States, also attended.

Example B: Second Technical Workshop on “Care Provision in Ageing Societies: What Are the Policy Challenges and How to Address Them”, 19-21 May 2005, Malta

This second workshop dealt with care provision issues, from prevention to a continuum of care provision, including specific needs of people with mental illnesses. As is the case of the Madrid Workshop, the workshop in Malta was followed-up by further work on the indicators themselves by a workshop on Care Indicators, hosted by the European Centre Vienna in Vienna, June 2006.

Timeline of the Follow-up and Monitoring Phase: 2003 – 2008

April 2004	November 2004	May 2005
Madrid, Spain Task Force Meeting	Vienna, Austria Task Force Meeting	Malta Task Force Meeting
May 2006	February 2007	
Copenhagen, Denmark Task Force Meeting	Vienna, Austria Task Force Meeting, jointly with the Expert Group for the UNECE Conference on Ageing	

3. Indicators to Monitor Implementation

A central task assigned to the European Centre in this project is to develop “indicators of achievement”. In this regard, technical workshops were held with key partners, in order to initiate debate and develop indicators related to different RIS Commitments – or topics. The first Workshop was held in April 2004 in Madrid, hosted by the Spanish Institute for Older Persons and Social Services (IMSERSO), and dealt with the topics (1) Demography, (2) Income and Wealth, (3) Labour Market Participation and Social Protection and (4) Financial Sustainability.

The latter two are directly linked to Commitments 4 and 5 of the RIS.

Based on the workshop’s outcome, the project team, together with a network of experts, has developed and finalised a list of “Madrid Indicators”, addressing the above-mentioned four topics. The second workshop was the UNECE-INIA Care Provision workshop, held in Malta in May 2005. Expert meetings were organized in June 2006, hosted by the European Centre. Another workshop on care indicators is planned to take place in Vienna during June 2007, in order to discuss and further develop these Care indicators.

3.1 List of Indicators

The outline of the list of indicators presented here was agreed upon at the workshop “Sustainable Ageing Societies: Indicators for Effective Policy-Making”, organised jointly by the European Centre, UNECE and the Spanish Institute for Older Persons and Social Services in April 2004 in Madrid. The indicators were finalised in an expert meeting held at the European Centre in Vienna in February 2006. In between those meetings, a wide range of international experts provided comments and suggestions.

The presented indicators cover four main topics:

- demography,
- income and wealth,
- labour market participation, and
- social protection and financial sustainability.

As far as possible, the indicators are gendered, compare old age with other age categories, and distinguish very old people. The list includes core indicators, and we envisage the collection of data on these indicators as an important undertaking. Resources and data availability permitting, they can be supplemented by additional indicators, classified into those of primary and secondary importance. The MA:IMI team illustrates the core and primary indicators in charts and provides additional information in technical appendices. For a detailed description of indicators, see **Appendix 2**.

In data collection, existing international sources, such as the databases of the UN, UNECE, Eurostat and European Commission reports, OECD, and ILO, are used to the largest extent possible. Data collected from these sources are presented for review to the national focal points on ageing for update and additional comments as necessary. Also, the European Centre looks forward to working together with the national focal points in obtaining data from national sources on indicators not covered by international sources. The data will be visualised in tailored-made charts, and published in booklets addressing the different topics. Core data will also be made available on the Monitoring RIS web page.

In the context of the project **Country Profiles** have been produced so far for the following countries and have been published on the website www.monitoringris.org:

- Albania (Demographic Indicators Profile),
- Armenia (Demographic Indicators Profile),
- Austria (Demographic Indicators Profile),
- Azerbaijan (Demographic Indicators Profile),
- Belgium (Demographic Indicators Profile, Income and Wealth Indicators Profile, Labour Market and Labour Market Participation Profile),
- Belarus (Demographic Indicators Profile),
- Croatia (Demographic Indicators Profile),
- Cyprus (Demographic Indicators Profile, Income and Wealth Indicators Profile),
- Czech Republic (Demographic Indicators Profile, Income and Wealth Indicators Profile, Labour Market and Labour Market Participation Profile),
- Denmark (Demographic Indicators Profile, Income and Wealth Indicators Profile, Labour Market and Labour Market Participation Profile),
- Estonia (Demographic Indicators Profile, Income and Wealth Indicators Profile, Labour Market and Labour Market Participation Profile),
- Finland (Demographic Indicators Profile, Income and Wealth Indicators Profile, Labour Market and Labour Market Participation Profile),
- France (Demographic Indicators Profile),
- Georgia (Demographic Indicators Profile),
- Germany (Demographic Indicators Profile),
- Great Britain (Demographic Indicators Profile, Income and Wealth Indicators Profile, Labour Market and Labour Market Participation Profile),
- Israel (Demographic Indicators Profile),
- Italy (Demographic Indicators Profile),
- Lithuania (Demographic Indicators Profile, Income and Wealth Indicators Profile, Labour Market and Labour Market Participation Profile),
- Latvia (Demographic Indicators Profile),
- The former Yugoslav Republic of Macedonia (Demographic Indicators Profile),
- Malta (Demographic Indicators Profile),
- Netherlands (Demographic Indicators Profile),
- Poland (Demographic Indicators Profile, Income and Wealth Indicators Profile, Labour Market and Labour Market Participation Profile),
- Portugal (Demographic Indicators Profile),
- Romania (Demographic Indicators Profile),
- Russia (Demographic Indicators Profile),
- Serbia (Demographic Indicators Profile),
- Slovakia (Demographic Indicators Profile),
- Slovenia (Demographic Indicators Profile),
- Spain (Demographic Indicators Profile),
- Sweden (Demographic Indicators Profile),
- Switzerland (Demographic Indicators Profile, Income and Wealth Indicators Profile, Labour Market and Labour Market Participation Profile),
- Turkey (Demographic Indicators Profile)

Forthcoming publication: “Mainstreaming Ageing: Indicators to Monitor Sustainable Progress and Policies”:

The European Centre is currently preparing a publication based on the workshop on “Sustainable Ageing Societies: Indicators for Effective Policy-Making”, held in April 2004 in Madrid, Spain. The forthcoming book **Mainstreaming Ageing: Indicators to Monitor Sustainable Progress and Policies** will provide a compilation of various contributions to the workshop related to the four topics addressed in the Madrid workshop: demography, income and wealth, labour market participation, and social protection and financial sustainability. In line with these topics there will be six main chapters: Part I reviews the changing demographic contexts; Part II examines income and wealth indicators; Part III assesses the quality of life considerations; Part IV looks into labour market participation and early retirement issues; Part V reviews the social protection sustainability issues; and Part VI examines economic growth and financial sustainability.

The book is edited by Bernd Marin and Asghar Zaidi of the European Centre, with assistance from Barbara Lipszyc and Mattia Makovec (both formerly researchers at the European Centre). The book is expected to be published during 2007. For more information please consult at: <http://www.monitoringris.org>

4. Website Monitoring RIS – www.monitoringris.org

The website was set up by the European Centre for Social Welfare Policy and Research in collaboration with the UNECE and the associated Task Force, sponsored by the Austrian Federal Ministry of Social Security, Generations and Consumer Protection. The Monitoring RIS Website, is dedicated to the knowledge and information about the follow-up of the RIS.

Aim of the website:

- deliver knowledge and information about the follow-up to the RIS;
- promote the exchange of experience in the field of ageing-related policies
- provide an overview of instruments, activities and resources, such as country facts and figures

The website provides **access to:**

Normative Frameworks:

Global and UN declarations and plans, regional strategies and treaties, national laws and decrees, local acts and regulations.

Tools, Facts & Figures:

RIS-relevant tools, facts and figures; for instance, links to interesting international databases. Based on the follow-up technical workshops and further studies, the sets of proposed indicators to monitor the implementation of the RIS are also illustrated.

Policies & Strategies:

RIS-relevant Policies & Strategies, from UN agencies global plans (such as the WHO "Active Ageing") to national and local declarations and programmes.

Implementation Activities:

Activities supporting RIS implementation: the establishment of a Monitoring RIS Task Force, the organization of follow-up workshops addressing RIS issues from the global (MIPAA) to the local level, the creation of national specific websites.

Networks:

RIS-relevant networks.

NGOs:

RIS-relevant NGOs.

Information is provided at four different levels: Global / Regional / National / Local (within the UNECE region).

All interested stakeholders – from governmental to local authorities, as well as NGO partners, should be in a position to gain access to the relevant information on the Website taking into account their specific needs.

The website is updated every two months, with input from the key networks, in particular by national Focal Points on Ageing and NGOs.

Future of the website

A focus will be on the country Fact & Figures in order to meet the interests of all stakeholders in the process and to assist them in their work.

Making developments visible, linking initiatives and events (Calendar of Events) aims to help to deepen the follow-up process to the Regional Implementation Strategy (RIS) for the Madrid International Plan of Action on Ageing 2002 (MIP) in the UNECE Region.

4.1 Normative Frameworks

An important aim on the national level is to make countries and their normative frameworks visible. The classification by country and the classification by commitment help to get an overview over existing achievements in legislation. **We invite countries** to make their achievements visible to the international readers of the web page.

4.2 Tools, Facts & Figures

The "Madrid indicators" cover four main topics: demography; income and wealth; labour market participation; and social protection and financial sustainability. As far as possible, the indicators are gendered, compare old age with other age categories, and distinguish very old people.

4.3 Policies & Strategies

National declarations and plans illustrate phases of national developments and outline the current situation in many UNCE countries.

We invite countries to make developments visible to the international readers of the web page. Some examples:

Austria

Document: National Action Plan on Social Inclusion ([EU-25: NAPs](#))

Belgium

Document: National Action Plan on Social Inclusion ([EU-25: NAPs](#))

Cyprus

Document: National Action Plan on Social Inclusion ([EU-25: NAPs](#))

Czech Republic

Documents:

- [National Programme of Preparation for Ageing 2003-2007](#) (pdf format) (government text with NGOs participation)
- National Action Plan on Social Inclusion ([EU-25: NAPs](#))

Denmark

Document: National Action Plan on Social Inclusion ([EU-25: NAPs](#))

Estonia

Document: National Action Plan on Social Inclusion ([EU-25: NAPs](#))

Finland

Documents:

- National Pension Strategy 2005 - [overview](#) (website), [full text](#) (pdf format)
- Finland for people of all ages (Government report 2004)
- National Action Plan on Social Inclusion ([EU-25: NAPs](#))

4.4 Implementation Activities

This category is dedicated to the support of the RIS implementation on all levels.

We invite countries to present advisory bodies and information to the international readers of the web page.

Guidelines

- **Guidelines for Review and Appraisal of the Madrid International Plan of Action on Ageing**
 - [Full text](#) (UN Programme on Ageing, pdf format), [Annex](#) (UN Programme on Ageing, pdf format)
 - [Chart of Indicators](#) (UN Programme on Ageing, pdf format)

Note: For the UNECE region, [national indicators](#) for national review and appraisal are elaborated in the framework of the MA:IMI project.

Statements

- **Written Statement on the Rights of Older Persons, officially endorsed at the UN Human Rights Commission**
 - Statement in English: [Ageing and the Rights of Older Persons](#)
 - Declaration en Francais: [Vieillessement et Droits de la personne âgée](#)

Follow-up Workshops and Conferences

- 2nd [MIPAA](#) International Meeting on the Follow-up of the World Assembly on Ageing "The Contribution of Older Persons to the Social and Economic Development" 16-18 November 2005, [IMSERSO](#), Madrid
 - [Summary](#)

4.5 Networks

Three key networks support the RIS follow-up process in the UNECE region:

Task Force

Besides the specific mandate given to the European Centre, the "Memorandum of Understanding" (**Appendix 1**) foresees the establishment by the Austrian Government and the UNECE of a Task Force with the function "to offer guidance and advice to the contents and priorities of the follow-up". The Task Force was established in Madrid in April 2004.

Focal Points

The network of National Focal Points on Ageing plays a key role in the follow-up process. The Focal Points are the national contacts in the 56 European Centre / UNECE countries regarding issues on "Mainstreaming Ageing" and on the follow-up to the Regional Implementation Strategy (RIS) of the Madrid International Plan of Action on Ageing (MIPAA, 2002). In particular, they are expected to support the MA:IMI project at the European Centre in gathering information about political processes, programmes and actions, and help and advise MA:IMI researchers on collecting and interpreting data for the indicators.

NGOs

NGO Network on Monitoring RIS

This Network is conceived as the NGO counterpart to the Network of National Focal Points on Ageing. Members of the NGO Network on Monitoring RIS are national NGOs that are specifically committed to watch age policies and social policy measures in their respective countries, thus providing a civil-society view of the progress made in the implementation of

the Madrid International Plan of Action on Ageing and its Regional Implementation Strategy. Their representatives act as resource persons vis-à-vis Government representatives and civil society at large in their respective countries.

Members of the NGO Network on Monitoring RIS spread knowledge about the MIPAA and RIS texts among grass roots organisations, engage in an exchange of information with Network members and other actors of the follow-up process in other UNECE Member States, and are a source of information for national Governments and International Institutions.

We invite countries to visualize national networks for the international readers of the web page to them.

4.6 NGOs

With delivering knowledge and information about the follow-up to the RIS we want to present a main stakeholder in the process - the NGOs.

We invite national NGOs to integrate themselves into the NGO Network on Monitoring RIS.

*Network: Member of the [NGO Network on Monitoring RIS](#)

Albania

Albanian Center of Geriatrics & Gerontology

[More Information](#) on the Albanian Center of Geriatrics & Gerontology

Armenia

Mission Armenia

(*Network)

[More Information](#) on Mission Armenia

Austria

EURAG Austria

(*Network)

www.eurag.at (in German)

[More Information](#) on EURAG Austria

Austrian Health Promotion Foundation / Fonds Gesundes Österreich (FGÖ)

www.fgoe.org

All interested stakeholders are invited to have a look at the current pages as an example of what can be provided for each region or country, and to submit to the Editorial Committee any information they regard as relevant and which could help to enhance the web page's accuracy. For that purpose, please use the online form or, alternatively, send suggestions to: **isweb@euro.centre.org**

5. Networks

5.1 Focal Points meeting in Segovia, 13-15 November 2006, Spain

The UNECE Population Activities Unit and the Institute for Older Persons and Social Services (IMSERSO) of Spain, with support from the United Nations Population Fund (UNFPA), organized the Meeting of National Focal Points on Ageing on 13-15 November 2006 in Segovia, Spain. The meeting was designed for assisting countries in conducting review and appraisal of MIPAA/RIS on the national level. The main objectives were:

- advise the focal points on how to better conduct the national level review and appraisal of MIPAA/RIS and to apply the bottom-up participatory approach in particular;
- deliver the outputs and show the potential of regional level projects designed to support the implementation of MIPAA: (1) MA:IMI - Mainstreaming Ageing: Indicators to Monitor Implementation, and (2) Employment and Fiscal Policy Implications of Ageing;
- exchange information on good practices in implementing MIPAA/RIS;
- identify and discuss capacity-building needs;
- facilitate bilateral and multilateral exchanges between national focal points;
- collect information on national level activities to feed into the planning of regional level activities; and
- contribute to the preparatory process for the UNECE Regional Conference on Ageing to be held in October 2007.

Based on the information collected by means of the questionnaire that was distributed to the focal points before the meeting and based on presentations and deliberations at the meeting, the UNECE Population Activities Unit prepared a report that includes an overview of MIPAA/RIS related activities in the region.

The European Centre participated in the meeting with two of its experts. Barbara Lipszyc presented the work of the MA:IMI indicators, including a visual illustrations of the indicators and the Monitoring RIS website. Asghar Zaidi participated as an expert in the roundtable discussion on social protection systems, presenting the situation with respect to pension systems and their impact on retirement incomes.

5.2 UNECE-Expert Group for the 2007 UNECE Conference on Ageing (Joint Meeting with Task Force Monitoring RIS February 26 / 27, 2007 in Vienna)

The Group consists of leading experts on ageing from a broad cross-section of professional, geographic and organisational backgrounds. Many of the experts are also members of the Task Force that advises the UNECE secretariat on monitoring the Regional Implementation Strategy (RIS) for the Madrid International Plan of Action on Ageing (MIPAA). The Group is expected to

- draft papers on the key areas of MIPAA/RIS;
- propose topics for the political declaration and agenda items for discussion at the 2007 UNECE Conference on Ageing, for consideration by the Preparatory Committee;
- provide expert advice on the regional summary report based on the national country reports on the implementation of the Regional Implementation Strategy of the MIPAA.

5.3 The contribution of the NGO-Network

The process of implementing the Madrid International Plan of Action on Ageing 2002 by putting into effect the Regional Implementation Strategy would benefit from collaboration and active participation of relevant stakeholders including civil society and in particular the relevant NGOs.

During the monitoring process and the review and appraisal activities it resulted and was expressed by the UNECE Secretariat, the Task Force Monitoring RIS as well as by the Expert Group for the preparation of the León Ministerial Conference in the second half of 2007 that a meeting of the Focal Points of NGOs would be highly recommendable in following the guiding principle of the "participatory bottom up approach". It was therefore suggested that an international Forum of Focal Points from NGOs be convened, which could result in the formation of a "Network of Focal Points from NGOs", in analogy to the "Network of Focal Points from Governments".

This Forum would serve at the same time as a starting point for the preparatory process for the upcoming Ministerial Conference on the NGO-Level by involving major international and national networks on ageing from the UNECE region. This could eventually lead to a NGO position paper to be presented at the León Conference.

Concerning the partnership with NGOs, for the upcoming High-Level-Conference the objective should be to match the qualitative criteria set and appreciated by all partners during the preparation and observation of the Ministerial Conference on Ageing in Berlin in 2002. It is the responsibility of UNECE-Member States not to fall behind these standards and to facilitate the equal participation of the international NGO-Network.

6. Renewal of the Memorandum of Understanding

In 2008, towards the end 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 make recommendations as to a possible renewal of the MoU, if appropriate. The evaluation should be carried out in the light of the results of the High-Level-Conference on Ageing in Autumn 2007.

Although the final decision on this is to be taken only after the León Conference, the Task Force supervising the work during the last years reached the following conclusion at its most recent meeting from 26 to 27 February 2007 in Vienna: "It was emphasised that the Memorandum of Understanding between the Austrian Government and UNECE should be renewed in order to enable the Task Force and the European Centre Vienna to continue their work for another five years, as this 2008 - 2012 review and appraisal cycle will be a demographically most crucial window of opportunity for adjustment for the majority of countries within the UNECE Region."

Regarding the contributions by Austria and Spain, the experts unanimously expressed their appreciation to the governments of Austria and Spain for their support of the work of the PAU. They also emphasized the need to continue with the Task Force Monitoring RIS and the work of the European Centre.

7. Overview of Experts Involved

UNECE, Geneva	Andres Vikat Holger Osterrieder Abdur Chowdhury Nikolai Botev, till 2005
National Focal Points on Ageing	Armenia: Jemma Baghdesaryan Austria: Erika Winkler Azerbaijan: Vahab Mammadov Belarus: Tatiana Pogonysheva Croatia: Spomenka Tomek-Roksandic Cyprus: Chloe Koromia Czech Republic: Petr Wija Denmark: Simone Heinicke and Anne Bækgaard Estonia: Kristina Täht Finland: Viveca Arrhenius/ Ritva Vuorento France: Antoine Saint-Denis The form.YR of Macedonia: Novsika Petrovska Georgia: Nadar N. Kipshidze Germany: Dorika Seib Holy See: Permanent Mission of the Holy See Israel: Avraham Lavine/Miriam Bar-Giora Italy: Isabella Menichini Kazakhstan: Ministry of Labour and Social Protection Latvia: Jana Muizniece Liechtenstein: Hugo Risch / Mr. Rainer Gstohl Lithuania : Vita Safjan Malta: Joseph Troisi Monaco: Anne Negre Netherlands: Bernard Baks Poland: Joanna Maciedewska Portugal: Deolinda Correia Romania: Ileana Carmen Manu Russian Federation: Irina Bondarenko Serbia and Montenegro: Lidija Kozarcanin Slovakia: Lýdia Brichtová Slovenia: Davor Dominkus Spain: Margarita Bravo Torres / Carmen Diaz Switzerland: Cyril Malherbe Turkey: Tuncer Kocaman/Yusuf Yuksel European Commission: Lisa Pavan-Woolfe
Federal Ministry of Social Affairs and Consumer Austria	Erika Winkler Alexandra Werba Elisabeth Zechner Eveline Hönigsperger, till 2006

<p>Task Force</p>	<p>Erika Winkler (Chairperson) Bernhard Baks Sylvia Beales Nikolai Botev Ruth Brand Margarita Bravo Torres Josefina G. Carbonell Carmen Diaz Rocio Fernandez Ballesteros Aurelio Fernández-Lopez Mariangles Fortuny Corredo Jessica Frank Lopez Helen R. Hamlin Robert Holzmann Eveline Hönigsperger Irene Hoskins Dirk Jarré Franz Kolland Lidija Kozarcanin Valentina Leskaj Bernd Marin Gerhard Naegele Jean-Marie Robine Dorika Seib Alexandre Sidorenko Roland Sigg Vappu Taipale Joseph Troisi Andres Vikat Alan C. Walker Petr Wija Irina Zbarskaya</p> <p>As experts/observers Barbara Lipszyc Alexandra Werba</p>
<p>NGO Network on Monitoring RIS</p>	<p>Mission Armenia EURAG Austria Zivot 90 DaneAge Association / Ældre Sagen German National Association of Senior Citizens Organisations / BAGSO International Federation on Ageing / IFA Spanish Confederation of Older People Organizations / (CEOMA) Swedish Association for Senior Citizens / SPF Swiss Council of the Elderly / SSR Help the Aged AARP</p>

<p>European Centre for Social Welfare Policy and Research, Vienna, Austria</p>	<p>Yitzhak Berman Bernd Marin Michael Fuchs Michael Förster Manfred Huber Orsolya Lelkes Barbara Lipszyc Mattia Makovec Marius Rummel Charlotte Strümpel Asghar Zaidi Silvia Fässler Mercedes Gonzalez-Quijano Annette Hexelschneider</p>
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For more information please consult the website <http://www.monitoringris.org>

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Disclaimer:

The views expressed in this paper are those of the authors, and neither the Federal Ministry of Social Affairs and Consumer Protection of Austria nor the United Nations Economic Commission for Europe (UNECE) bear any responsibility towards data used and interpretations made in the paper.

Appendices

Appendix 1 – MoU between the UNECE and the Government of Austria

Appendix 2 - List of Indicators



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.

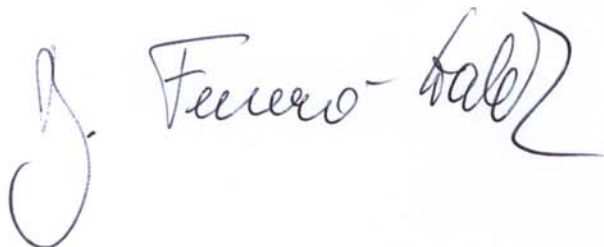
Signed on 01/23/ 2004 in Vienna



For the Government of the Republic of
Austria:



For the United Nations Economic
Commission for Europe:



I. Demographic indicators

Suggested Indicators						
Group		Definition		Sources / Availability	Type ²	Notes
DEM01	Basic Dimensions and Population Ageing	DEM01a	Population Size	<i>UN World Population Prospects, 2004 Revision</i>	Core	1950-2050 (at least in five-years intervals)
		DEM01b	Population by Five-Year Age and Sex (%)	<i>UNECE, Trends in Europe and North America</i>	Core	Population pyramid; plotted together with median age for same year
		DEM01c	Median Age of the Population	<i>UN World Population Prospects: 2004 Revision</i>	I	Time trend: 1950 – 2050
		DEM01d	Median Age standardized for Life Expectancy (“Prospective Age”)	<i>WHO, UN World Population Prospects, OECD. Methodology: see Sanderson & Scherbov2005</i>	I	2000 as the index year; plotted on the same chart as DEM01c
		DEM01e	Population Changes: Natural Growth, Overall Growth	<i>UN World Population Prospects</i>	Core	
		DEM01f	Population by Aggregate Age Groups: 0-14, 15-64, 65+	<i>UN World Prospects: 2004 Revision, UNECE Demographic database</i>	Core	1950-2050, in five-years intervals
		DEM01g	Demographic Dependency Ratios: 0-14/15-64; 65+/15-64; ((0-14)+(65+))/15-64	<i>Derived from DEM01f</i>	Core	1950-2050, in five-years intervals
		DEM01h	Ageing of the Aged: Share of the Very Old (80+) in the Total Elder Population (65+)	<i>UN World Population Prospects</i>	Core	1950, 2000, 2050
		DEM01i	Percentage of the Population Living in Single-Person Households, % Living in Institutional Households, by Sex and Age-Group: 0-14, 15-64, 65-79, 80+	<i>Community Programme of Population and Housing Censuses in 2001</i> by Eurostat. Data for EU countries to be requested from Eurostat. In non-EU countries, available from a standard census publication	I	Footnote: is institutional population distinguished or not?

² I: Primary; II: Secondary.



Around the 3 determining factors:						
DEM02	Longevity	DEM02a	Life Expectancy at Ages 0, 1, 20, 65, 80 (and at the legal retirement age, if that is different from 65), by sex	<i>Eurostat 2006, UN Life Tables (UN World Prospects)</i>	Core	Presentation needs to be footnoted: "Life Expectancy is a measure of mortality in the given calendar year"
		DEM02b	Survival Rates at ages 20, 60, 65, 80	<i>UN Life Tables (UN World Prospects)</i>	I	1950-2005
		DEM02c	Pension duration of people retiring today & duration extension over time (<i>cohort indicator</i>)	<i>Residual LE : UN Life Tables ; Effective Retirement Age : Scherer.</i>	Core	Operationalisation needs: residual LE at 65 and effective retirement age
DEM03	Fertility	DEM03a	Total Fertility Rate	<i>UN World Population Prospects 1950-2002, (also using NewCronos)</i>	Core	1950-2000 (or 2005), in five-year intervals
		DEM03b	Net Reproduction Rate	<i>UN World Population Prospects</i>	I	1950-2000 (or 2005), in five-year intervals
DEM04	Migration	DEM04a	Net Migration	<i>Information implicit in DEM01e</i>		Obtained by subtracting natural growth from overall population growth
Useful supplementary indicators:						
DEM05	Health Indicator	DEM05a	Health-adjusted life expectancy (HALE), disability-free life expectancy (DFLE), by sex <i>Alternatives measures of disability trends will be considered under the Care Topic later on</i>	<i>Eurostat // Euro-REVES, WHO</i>	I	Presentation needs to be footnoted with a warning on data quality, availability and comparability [which years?]. Another footnote: are institutionalised persons in or out of the sample?
DEM06	On Disruption in Cohort Flows	DEM06a	Flags for "demographic shocks"	<i>National Sources</i>	II	Only graphical representation?



II. Income and wealth

Suggested Indicators³

Group		Definition		Source / Availability	Type	Notes
IW01	Income status	IW01a	Average disposable income ⁴ (in PPPs, for different age groups, e.g. 25-54, 55-64; 65-74; +75)	ECHP, EUROSTAT Newcronos database (EU15), LIS (for more New Member countries); EU-SILC ⁵	Core	
		IW01b	Relative disposable income (total population = 100)		Core	
IW02	Income Distribution and Composition	IW02a	S80/S20 ratio of disposable income, by age group		ECHP, EUROSTAT Newcronos database (EU15); EU-SILC	I
		IW02b	Income composition, by income groups (quintiles): income from work, private income, old-age benefits, other benefits.	Core		
IW03	Poverty	IW03a	Relative income poverty rate, at 60% median threshold, by age group	ECHP, EUROSTAT Newcronos database (EU25), LIS (for non-EU25); EU-SILC	Core	
		IW03b	Median income poverty gap at 60% median threshold		I	
		IW03c	Persistent income poverty rate (3 years poor out of 4), at 60% median threshold		I	
		IW03d	Non-monetary deprivation rates, national definitions		II	
IW04	Minimum Income Protection for Older Persons	IW04a	Institutional features of minimum income guarantee for older people (e.g. social pensions)	MISSOC (EU25, Bulgaria, Romania) + National sources	Core - Instrumental	Short info + technical appendix
		IW04b	Amount of the minimum income protection level as % of 1) the average pension, 2) the minimum wage (or equivalent), 3) the poverty line (60% of national median)		I	
		IW04c	Share of older persons relying, fully or partly, on minimum income protection schemes and other old-age related benefits as % of the population above 65 (or different thresholds);		I	

³ The following list of indicators implicitly assumes breakdowns by gender and comparisons between different age groups: 65-74 (+75, and when possible +85) vs. 55-64 and vs. the prime age population (25-54), subject to data availability.

⁴ We refer from now onwards to disposable household income equivalised using the OECD modified equivalence scale.

⁵ ECHP data are available until 2001; the survey has been replaced by EU-SILC which will cover all 25 New Member States. The EUROSTAT database reports EU-SILC data for the old EU 15 Member States from 2003-2004 (survey years), but data are not available yet for the New Member States. For the period between 2001 and 2003, EUROSTAT data refer to national surveys.



		IW04d	Per capita expenditure on minimum income protection schemes *) Presentation needs to be footnoted with a caveat: "institutional differences in the design of the benefits might make cross-country comparisons problematic"	OECD countries + National sources; EUROMOD and I-CUE feasibility studies; ESSPROSS	I	*)
IW05	Wealth	IW05a	Composition of wealth holdings by components (e.g. housing; financial assets);	LWS, National Sources SHARE	I	
		IW05b	Distribution of total wealth by age groups;	ECHP (EU15) LIS for New Member Countries LWS (not available yet) National Sources; SHARE	II	
		IW05c	Average Individual (Pension) Wealth at Retirement Age	Central Banks, National Sources	I	
IW06	Income and Wealth Mobility	IW06a	Development of income of pensioners (broken down by private sources vs. public transfers) over their retirement period;	ECHP, GSOEP for a limited number of countries (1984-2001) – EU15 only	II	
IW07	Pension Indicator	IW07a	Net replacement rates (e.g. age group 65-74 vs. 55-64)	OECD, European Commission	Core	Footnote: empirical, not stylised replacement rates



III. Labour Market and Labour Market Participation

Commitment 5: "To Enable Labour Markets to Respond to the Economic and Social Consequences of Population Ageing"

According to Commitment 5, four main policy objectives should be met, through related specific measures. Between brackets are listed the indicators proposed to monitor these measures and objectives:

- 1. Seek a significant reduction in rates of unemployment, especially for older persons (LM03)**
Measures to promote access to employment opportunities and reduce unemployment rates, especially for older persons, are necessary
 - To implement active labour market policies (LM03a)
such as job matching, job- search assistance, training, vocational guidance, counselling, and so on
 - Efforts aimed at shaping educational curricula to respond to labour market needs and at easing the transition between formal education and work can help promote employment (LM03b)
 - Measures to reduce non-wage labour costs while protecting workers' rights (LM03c)
 - Other factors weakening the demand for labour, such as barriers to new business start-ups and regulations imposing heavy administrative costs on employers should be carefully scrutinised and, where possible, eased (LM03d)
- 2. Improve the employability of older workers (LM04)**
 - Through vocational guidance and vocational training, based on life-long learning (LM04a)
Employers should be encouraged to enable their employees to retrain and reskill through life-long learning
 - Other measures should focus on improving working conditions (LM04b)
- 3. Raise participation rates for all women and men (LM01)**
 - Improve care facilities and introduce arrangements, which make it easier for all workers, women and men, to combine work and family responsibilities (LM01d)
 - Remove barriers and disincentives to work longer, including the incentives that encourage early retirement (LM01a, LM01b, LM01c)
 - Promote the rehabilitation of workers with disabilities and their re-integration in the labour force (LM01e)
 - Promote better training of older workers, and take measures against age discrimination (LM01f, LM01g)
 - Review financial and other disincentives to the participation of retired persons in part-time or temporary employment (LM01h)
 - Increase through economic policy and incentives employment opportunities for persons living in rural and remote areas, in particular encouraging their distance learning and training (LM01i)
- 4. Take steps to raise the average effective age at which people stop working and make retirement more flexible and gradual (LM02)**
Labour market structures and economic policies should be promoted together with social protection systems that offer incentives for the participation of older workers, so that workers are not encouraged to take up early retirement and are not penalised for staying in the labour market as long as they wish and that pension systems and working arrangements facilitate the option of gradual retirement In the case of those who opt to retire, every effort should be made to promote a smooth and gradual transition from one type of life to another.

Additional discussions / suggestions mentioned in Commitment 5:

- Particular emphasis should be made on incentives for engaging older persons in SMEs (LM01j)
- To increase the awareness of the benefits of including older persons in the workforce and eliminating age barriers and discrimination in recruitment and employment of older workers (LM01f, LM01g, LM06)
- Concerted measures are needed to increase labour force participation of women (**rationale for generalised gender breakdown**).

These measures should aim to

- further broaden their job opportunities,
- better reconcile the professional and family responsibilities (see also future Care indicators)
- and avoid discriminatory situations with regard to pension benefits or personal income experienced by many women. (see also SUS11)

Important ways to achieve this are suitable education and training, including on-the-job training, job counselling and allowing for flexible work arrangements.

- Special needs of ageing migrants should be taken into consideration (LM05), as appropriate, and consistent with national laws in the design and implementation of integration programmes to facilitate their participation in the social, cultural and economic life of countries of destination.



Group	Subgroup	Definition	Source/ Availability	Type	Notes	
LM01	Participation Rates	LM01a	i) Labour force participation rates of workers aged 55-64 compared with total population and other reference age groups (prime age: 25-54)	<i>EUROSTAT, OECD, ILO</i>	Core	1980-2004
			ii) Employment rates for workers aged 55-64 compared with total population and other reference age groups (prime age: 25-54)		Core	1980-2004
			iii) Share of workers aged 55-64 in the total labour force (and in the employed population) and its growth rate(e.g. comparing decades)		I	1980-2004
			iv) Median Age of the Labour Force, compared to the median age of the population		<i>ECHP</i>	I
		LM01b	Unemployment and inactivity rates by age groups: 55-64 in comparison to the total population and other reference age groups (prime age: 25-45 or 25-54)	<i>EUROSTAT, OECD, ILO</i>	Core	
		LM01c	Long-term unemployment rates for people aged 55-64 in comparison to the total unemployed population		I	1985-2005
		LM01d	Time spent in paid vs. unpaid work activities (e.g. volunteering vs. household production) by age groups *) This policy measure will also be addressed at a later stage (see Care indicators)	<i>ECHP (EU15) LIS OECD (Willem Adema), Babies and Bosses, Time use survey (Society at a Glance)</i>	I	2001 (or latest year available)
		LM01e	i) Disability rates by age groups	<i>EUROSTAT, ECHP, OECD</i>	II	
			ii) Outflow rates from disability benefit recipient status to work, by age groups		II	
			iii) Share of non-employed disability benefit recipients at ages younger than the statutory retirement age and above age 50, as % of the population aged between 40 and 65 years, and as % of the retired population aged between 40 and 65 years	<i>ECHP (EU15), OECD (see Scherer)</i>	I	
		LM01f	Earnings comparison between age groups (by education)	<i>EUROSTAT, ECHP, OECD (Live Longer, Work Longer)</i>	II	
		LM01g	i) Existence of mandatory retirement age	<i>National sources, OECD (Working conditions)</i>	Core	Instrumental, same chart as LM02h
			ii) Existence of age limits to the application of dismissal laws			
			iii) Existence of age-related reasons to force people out of work			
			iv) Existence of protection laws against forced retirement			
LM01h	Part time employment rates for mature-aged workers (55-64) compared to part time rates in the total population or in other population subgroups (prime age, e.g. 25-45 or 25-54)	<i>OECD</i>	II			
LM01i	Employment and labour force participation rates of mature-aged workers (55-64) by regional breakdown and urban vs. rural areas distinctions	<i>ECHP / Newcronos (EU15)</i>	II			
LM01j	Share of mature-aged workers (aged 55-64) on the total workforce at the firm level by firm size	<i>ECHP, ILO</i>	II			



Group		Subgroup	Definition	Source/ Availability	Type	Notes
LM02	Average Effective Retirement Age and Flexible Retirement	LM02a	i) Average effective labour market exit age *) Presentation needs to be footnoted with a caveat: “difficulties might arise when computing the retirement status variables from microdata using self-defined status”	<i>EUROSTAT, complemented if necessary with ECHP (EU15), OECD (see Scherer)</i>	Core	same chart as LM02b and LM02c + *)
			ii) Alternative: expected time spent in employment	<i>See Hytti & Nio (2004)</i>		Not enough data available yet
		LM02b	Effective retirement age for 25% and 75% of the labour force	<i>See LM02a</i>	Core	same chart as LM02a and LM02c
		LM02c	“Early Exit”: difference between the average effective retirement age and the statutory retirement age	<i>See LM02a</i>	Core	same chart as LM02a and LM02b
		LM02d	“Early / Late Retirement”: people retiring in a certain year: % before and after 65 (or % before and after legal retirement age)	<i>National administrative sources</i>	I	
		LM02e	Average age of entry into employment (age of getting the 1 st job)	<i>EUROSTAT, complemented if necessary with ECHP (EU15), OECD (see Scherer)</i>	I	
		LM02f	Lifetime allocation of work and non-work (one point in time)	<i>OECD</i>	I	
		LM02g	Implicit tax on work (accrual of benefits if retirement is delayed after the first eligibility age)	<i>OECD (Ed. Whitehouse), National sources</i>	I	
		LM02h	<u>Instrumental</u> i) Existence of flexible retirement corridors at the national level; ii) Spread (or “generosity”) of the retirement corridor. Operationalisation: youngest, statutory and oldest eligibility age for old-age benefits take up, by gender, under the current system (or “currently”) and the fully operational system after eventual reforms	<i>National sources, OECD Pensions at a glance</i>	Core	Instrumental, same chart as LM01g



Group		Subgroup	Definition	Source/ Availability	Type	Notes
LM03	Unemployment Reduction	LM03a	Participants in ALMP (<i>Active Labour Market</i>) programs targeted to workers aged 55+	<i>EUROSTAT</i> → <i>National sources</i>	II	
		LM03b	Employment rates and labour force participation rates of workers aged 55-64 by educational attainment	<i>EUROSTAT,</i> <i>ILO,</i> <i>OECD (Education at a glance)</i>	II	
		LM03c	Non-wage Labour Costs as a % of Wages over time	<i>Carone et al.</i>	II	
		LM03d	Indicators of employment protection legislation (inverse), possible tax schemes	<i>OECD database on employment protection legislation</i> + <i>ILO's Social Security Inquiry</i>	II	
LM04	Employability of Older Workers	LM04a	Share of workers aged 55-64 involved in (re)training activities as % of both the population aged 55-64 and of the labour force aged 55-64	<i>ECHP,</i> <i>SHARE</i>	II	
		LM04b	Days of sickness or absence for workers aged 55-64 vs. other reference groups (e.g. 25-54)		II	
LM05	Ageing Migrants	LM05a	Employment and labour force participation rates of native born vs. foreign born: both in working age and after 65	<i>OECD,</i> <i>ECHP</i>	II	
		LM05b	Actual retirement age of foreign born vs. native born		II	
		LM05c	Existence of residence rights for foreign born after retirement		II	
		LM05d	Average wage for foreign born vs. native born, overall and at retirement age		II	
LM06	Eliminating Age Barriers and Discrimination in Recruitment and Employment of Older Workers	LM06a	Existence of national public campaign or awareness campaign for anti-discrimination of older workers	<i>National sources</i>	II	
		LM06b	Related expenditures		II	
		LM06c	Existence of any assessment measure of the effectiveness of the campaign		II	



IV. Social Protection and Financial Sustainability

Commitment 4: “To Adjust Social Protection Systems in Response to Demographic Changes and their Social and Economic Consequences”

According to Commitment 4, four main policy objectives should be met, through related specific measures. Between brackets are listed the indicators proposed to monitor these measures and objectives:

1. **Preserve and strengthen the basic objectives of social protection, namely to prevent poverty and provide adequate benefit levels for all** (SUS01, SUS02, SUS08)
 - Extension of social protection systems to all sections of the population, from the very young to the very old
 - To support social inclusion through participation in the labour force for the young and those of working age: (SUS08, SUS09, see also LM indicators)
 - To provide a standard of living for persons who are not able to work due to disability and for persons beyond working age, that allows them to maintain their self-respect and dignity (SUS01a, SUS01b, SUS02)
 - In particular, to achieve a sufficient income for all older persons (SUS01, SUS02)
2. **Establish or develop a regulatory framework for occupational and private pension provision** (SUS10)
3. **Adapt existing social protection systems to demographic changes and changes in family structures** (SUS03, SUS04, SUS05, SUS06, SUS07, SUS08, SUS09)

Policies should address the needs of older persons for a variety of social and health services, including sheltered housing and long-term care (SUS05b, see also future Care indicators)

4. **Pay special attention to the social protection of women and men throughout their life course** (SUS11)
 - Equal treatment of men and women in social protection systems (SUS11a, SUS11b)
 - Support a better reconciliation of work and family responsibilities throughout the life cycle (SUS11d, see also future Care indicators)

Special attention needs to be paid to the position of those family members who interrupt their employment to rear children or to care for family members and as a result suffer reduction in their pension entitlement (SUS11e) and those who devote themselves to household work and the care of children and other relatives. Both groups often face a precarious financial situation in old age.

Policies to alleviate these problems could include (see also future Care indicators)

- Special leave arrangements for working parents and other caregivers, (SUS11d)
- Other supportive measures such as respite care services.

Additional discussions / suggestions mentioned in Commitment 4:

- Social protection systems:
 - Can also contribute to adequate income maintenance (SUS01)
 - Reflect broader political and social values of social justice and cohesion, which place limits on the degrees of inequality or social deprivation a society is willing to tolerate (SUS02)
- Social security faces many challenges in adapting (SUS04c, SUS04d, SUS08)
 - to changes in family structure,
 - to the emergence of more unstable work patterns
 - to changes in the age profile of populations and globalisation
- Systems -- or combinations of them -- are needed that strengthen incentives to participate in the labour force (SUS07, SUS08, SUS09, see also LM indicators) while ensuring protection for the weakest groups in society (SUS02)
- Steps should be taken to ensure financial sustainability of social protection systems in the face of demographic ageing (SUS04, SUS05, SUS06, SUS07, SUS08)
- The various types of benefit system -- social insurance (financed from but not directly related to contributions) (SUS03), universal benefits, means-tested benefits -- have different implications for the behaviour of both recipients and their employers.



Group		Subgroup	Suggested Indicators	Sources / Availability	Type	Notes
SUS01	Adequate Income Maintenance	SUS01a	Stylised (individual) replacement rates, current and prospective (system indicator, not empirical RRs)	<i>European Commission 2006, SPC 2004, NSR 2005</i>	Core	
		SUS01b	Stylised (individual) overall replacement ratio, for early retirees	<i>Casey et al. 2003, 84ff</i>	I	
		SUS01c	Aggregate replacement ratios (average monthly pensions of retirees aged 65-74 as a percentage of average monthly earnings of employed aged 50-59; if available also for retirees and employed as a whole)	<i>European Commission 2006; HV österr. SV; NSR 2005</i>	I	
			<i>Alternative: Median income ratio between persons aged 65 years or more and persons aged 55-64 years, by gender (if relevant then subgroups, e.g. workers)</i>	<i>Eurostat: EU-15 1995-2001; NSR 2005</i>	I	See IW07b
		SUS01d	Pension Wealth: present value of the future stream of (net of tax) pension payments to which a person is entitled over his/her life in retirement (multiple of economy-wide average earnings)	<i>OECD 2005</i>	Core	
		SUS01e	Required contribution period in order to get the minimum (guaranteed) pension (in earnings-related old-age pension system) for a median or low income person	<i>Rürup 2004; OECD/Ed Whitehouse</i>	I	
SUS02	Social Justice and Inequality	SUS02a	Generosity towards the poor: replacement ratio of the bottom quintile divided by the replacement ratio of the top quintile	<i>Soziale Sicherheit 2/2003: AUT 2001</i>	II	
		SUS02b	Stylised (individual) replacement rates by different earnings levels (100% and 2/3 of average income)	<i>SPC 2004, NSR 2005</i>	Core	Should be next to SUS01a
		SUS02c	Ratio minimum pension/average pension	<i>NSR 2005</i>	I	See IW04b
		SUS02d	Ratio S80/S20 by gender and age	<i>Eurostat, NSR 2005</i>	I	See IW02a
		SUS02e	Social exclusion: coverage of older persons (% benefiting from minimum pension schemes)		I	See IW04c
		SUS02f	Intergenerational fairness: overall liability of the State with respect to future generations	<i>No data (operationalisation: still open)</i>	II	
SUS03	Relationship between Contributions and Benefits	SUS03a	Necessary contribution level / alt. necessary pensions adjustment (“implicit contribution rate”) to balance pensions expenditure (where it applies) vs. effective contribution rate	<i>NSR 2005; OECD 2005; EPC 2005; European Commission 2003b</i>	I	
		SUS03b	Implicit / notional rate of return on social security-pension contributions (“Benefit-cost ratios”)	<i>OECD/ Ed Whitehouse</i>	II	



SUS04	Public and Total Pension Spending ⁶	SUS04a	i) Public pension spending projected for a defined period of time (2004-2050) as % of GDP ii) Total pension spending...	<i>EPC 2006, EPC 2003, NSR 2005, Eurostat, GVG 2002, Holzmann 2003</i>	Core	Same chart as SUS04b
		SUS04b	i) Public pension spending in % of all social expenditures ⁷ ii) Total pension spending...	<i>ESSPROSS; EPC 2006, EPC 2003, NSR 2005, Eurostat, GVG 2002, Holzmann 2003</i>	Core	Same chart as SUS04a
		SUS04c	i) Decomposition of projected public pension spending increase by changes in: dependency; employment; take-up; relative benefit level	<i>NSR 2005, Casey et al. 2003; EPC 2006</i>	I	
			ii) Decomposition of projected total pension spending increase ... (if available)			
		SUS04d	i) Sensitivity test for public pension spending projections: increased employment, increased employment of older workers, higher life expectancy	<i>EPC 2003, EPC 2001, EPC 2006</i>	II	
			ii) Sensitivity test for total pension spending projections ...			
		SUS04e	i) Public pension spending covered by contributions (operationalisation: yearly contribution revenue as a % of pension expenditure)	<i>NSR 2005; EPC 2006</i>	I	
			ii) Total pension spending ... (if available)			
SUS04f	i) (Accumulated) assets in public pension schemes	<i>EC 2003; NSR 2005; EPC 2006</i>	II			
	ii) (Accumulated) assets in all pension schemes					
SUS05	Age-related Public Expenditure	SUS05a	i) Age-related public expenditure (pensions, health and long-term care) in % of GDP	<i>EPC 2003, 33f; EPC 2006</i>	I	
		SUS05b	Projected expenditure in % of GDP:		II	
			i) health care	<i>EPC 2003, GVG 2002, OECD 2006; EPC 2006</i>	II	
			ii) long-term care	<i>EPC 2003, GVG 2002, OECD 2006; EPC 2006</i>	II	
SUS06	Sustainability of Public Finances	SUS06a	Sustainability gap indicators: S1, S2 (former tax gap indicators: T2, T3)	<i>EPC 2003, Salomäki 2006</i>	I	
		SUS06b	Projections for public debt evolution	<i>No data so far; EC, EPC to come</i>	II	
SUS07	(Dis-) incentives for Early Retirement	SUS07a	Replacement ratio for early retirees	<i>See above - SUS01b</i>		
		SUS07b	Exploring the incentive to retire			
			i) Accrual: change in social security wealth by postponing retirement for 1 year	<i>Casey et al. 2003</i>	I	

⁶ The definitions for public spending will follow the distinctions made by the EPC, this concerns especially the question whether expenditures for mandatory private funded 2nd tiers of the pension systems are included or not. Data for total pension spending will be provided as far as it is available.

⁷ Also takes into account possible decreasing expenditures in other areas, e.g. education, unemployment (projected expenditures education, unemployment in % GDP see EPC 2003, 29f).



			ii) Tax rate: the accrual divided by the (potential) gross earnings, during the year of postponement	<i>i) + ii): OECD: April 2006 new data (Ed. Whitehouse)</i>	I	
			iii) System accrual rates, decreases for early retirement, increases for deferral of retirement	<i>iii) OECD 2005, NSR 2005, MISSOC 2005: EU-25, OECD countries; OECD/ Ed Whitehouse</i>	I	
		SUS07c	System dependency ratio (SDR) in public pension schemes	<i>See below - SUS08a</i>	Core	Outcome indicator
		SUS07d	Lifetime allocation of work and non-work (one point in time) (pension reciprocity duration / employment duration)	<i>Burniaux et al. (OECD) 2004</i>		Outcome indicator, See LM02f
		SUS07e	Take-up Ratio: Number of pensioners receiving public pensions relative to the population aged 65+	<i>EPC 2006; World Bank Pensions Database</i>	I	Outcome indicator
SUS08	(System-Related) Dependency Ratios	SUS08a	System dependency ratio (SDR) in public pension schemes SDR = number of pensioners / number of insured workers	<i>EPC 2006; HV österr. SV; GVG 2002, IMF 2004; NSR 2005</i>	Core	
		SUS08b	Difference between SDR and old-age dependency ratio (as a measure of the system's efficiency)	<i>See SUS08a</i>	Core	Same chart as SUS08a
		SUS08c	Ageing burden indicator (replacement rate * SDR)	<i>Data: see SUS01a and SUS08a; Concept: Lefèbvre/Perelman 2005</i>	I	
SUS09	Life-Time Allocation	SUS09a	Life cycle support ratio (ratio: the number of working years to the number of retirement years over time * inheritance gains [deaths prior to retirement] * expected growth)	<i>Data and concept: see Settergren / Mikula 2001</i>	I	
		SUS09b	Lifetime allocation of work and non-work (one point in time)	<i>Burniaux et al. (OECD) 2004</i>		See LM02f
		SUS09c	Drop-out-ratio in working age (total number of benefit years of persons younger than 65 vs. total number of labour years of persons older than 15)	<i>Peters et al. 2004 (early retirement pensions, persons aged 15-64, 1990-1998)</i>	II	
SUS10	Private Pension Provision	SUS10a	% of working age population / active population participating in private pension schemes	<i>SPC 2005, OECD 2005b</i>	I	
		SUS10b	Average contribution to income of retirees	<i>SPC 2005, OECD 2005b</i>	I	
SUS11	Gender, Reconciliation of Work and Family	SUS11a	<u>Instrumental</u> indicator: Age differential in statutory retirement age (between men and women)	<i>MISSOC 2005</i>	Core	
		SUS11b	<u>Instrumental</u> : Possibility and fairness of widow pensions	<i>MISSOC 2005</i>	II	
		SUS11c	<u>Instrumental</u> indicator: contribution base for child caring times (how child care does / does not count for pension benefit calculations) (+ figures OECD)	<i>MISSOC 2005, NSR 2005; OECD: to come 2006</i>	Core	
		SUS11d	<u>Instrumental</u> indicator: parental leave schemes, etc. *) <i>this measure will be addressed at a later stage (see Care indicators)</i>	<i>MISSOC 2005; World Bank Database; UNECE</i>	Core	

