

**UNITED NATIONS
ECONOMIC COMMISSION FOR EUROPE**

WORKING GROUP ON AGEING

First meeting
Geneva, 1–2 December 2008
Item 5a of the provisional agenda

**PROPOSAL FOR THE CONTINUATION OF THE PROJECT
MAINSTREAMING AGEING: INDICATORS TO MONITOR IMPLEMENTATION
(MA:IMI)**

Summary

This document outlines a proposal by the European Centre for Social Welfare Policy and Research for the continuation of the project Mainstreaming Ageing: Indicators to Monitor Implementation. The main areas of work are developing further indicators to monitor the implementation of the UNECE Regional Strategy for the Madrid International Plan of Action on Ageing and maintaining the website for exchanging information and good practices related to the implementation of this Strategy in UNECE member states. The proposal also outlines plans for workshops and conferences, scientific publication and newsletter alerts.



PROPOSAL FOR THE CONTINUATION OF THE PROJECT
“MAINSTREAMING AGEING: INDICATORS TO
MONITOR IMPLEMENTATION (MA:IMI)”

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November 2008

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BACKGROUND AND SUMMARY

The European Centre for Social Welfare Policy and Research, Vienna, an inter-governmental organization affiliated to the United Nations, has been mandated and undertaking various follow-up activities to the so called “Madrid Process” and “Berlin Process”, both since 2002. This work was done in accordance with the mandate given to the United Nations regional commissions by the Madrid International Plan of Action on Ageing (MIPAA), April 2002, and by the Regional Implementation Strategy (RIS) as adopted, together with the Berlin Ministerial Declaration “A Society for all Ages in the UNECE Region”, by the Ministerial Conference on Ageing (MiCA), Berlin September 2002.

A “Memorandum of Understanding between the United Nations Economic Commission for Europe (UNECE), and the Government of the Republic of Austria”, signed in late January 2004 in Vienna, specified the terms of this follow-up work performed by the European Centre, Vienna and its assistance to the UNECE, Geneva. It provided material support for the European Centre through earmarked funds from the Host Government Austria (in particular its Ministry of Social Security, Generations and Consumer Protection and its Ministry for Foreign Affairs) and advice by an international Task Force set-up to guide its work programme.

In the first review and appraisal cycle of MIPAA and RIS in the period between 2003 and 2007/2008, the European Centre provided technical support and had helped to review the implementation of the Plan by the United Nations Member States, without heavy reporting burden and by a monitoring process based on effective exchange of information, experiences and best practices, avoiding simplistic comparisons. The European Centre Vienna established, as required, a separate “Mainstreaming Ageing: Indicators to Monitor Implementation” (MA:IMI) unit within the Centre, with the consent of the Board of Directors. This unit was staffed with two full-time equivalent, and in the course of the project up to 14 researchers, administrative and technical staff provided the necessary support. While the programme of work would not have been possible without the generous support of the Austrian Host Government as well as that of the Spanish authorities and of UNFPA, the major part of the human resources operating was provided by the European Centre itself, and therefore more than doubling the basic endowment offered by the Republic of Austria to the European Centre.

In accordance with the Memorandum of Understanding and the mandate specified herein, the European Centre, in collaboration with the UNECE Secretariat and its Population Ageing unit (UNECE / PAU), promoted an exchange of experiences in the field of policies related to ageing, carried out data collection, research and analyses in co-operation with agencies such as the World Bank, ILO, ISSA, EUROSTAT, OECD etc., with national authorities, NGOs and other concerned bodies. Briefly, the European Centre had undertaken the following tasks during the 1st phase of the MA:IMI project:

- prepared short annual reports and conference room papers to the UNECE Secretariat
- promoted exchange of information among experts, policy-makers and civil society by (co-)organizing and participating in a series of more than a dozen conferences, workshops, expert and Task Force meetings
- developed a set of agree-upon “indicators of achievement” (in particular in the areas of demographic changes, income and wealth, labour market and early retirement, sustainable social security, as well as economic growth, financial and social sustainability)

- collected and analysed data for these “indicators of achievement” and visualized the findings by charts
- created “country profiles” using these “indicators of achievement” which are translating MIPAA and RIS objectives into operational measures and standards by which monitoring of progress in goal achievement can be assessed
- organized the dissemination of Mainstreaming Ageing results by the creation of a special Website “Monitoring RIS”
- produced many “Mainstreaming Ageing” and “A Society of All Ages” publications, including 11 book publications, 2 special reports, 6 policy briefs, and dozens of contributions to books and refereed economic and social science professional journals
- disseminated findings also through newspapers, journals, magazines, radio, TV and press conferences
- created, together with UNECE, several networks where experts, policy-makers and civil society could meet, such as, for instance, the “National Focal points on Ageing”, the “Task Force”, the “NGO Network on Monitoring RIS”, several European Centre External Expert Networks for Mainstreaming Ageing Indicator Work, etc.

In the Memorandum of Understanding with UNECE signed in January 2004 in Vienna, it was foreseen that “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 MA:IMI project is nearing the end of the fourth year of its first, initial and take-off phase of work 2003 - 2008. The European Centre is looking forward to the evaluation envisaged and it is currently in search of financial support to continue the work foreseen as essential in the second 5-year review and appraisal cycle of MIPAA and RIS from 2008 to 2012. This second phase will beyond doubt be of historical importance and a most critical one, as the demographic bonus is now coming to an end in many UNECE Member States (in particular in most of the EU-27 countries) and a last window of opportunity to implement at least the core measures to live-up to the goals, objectives and 10 commitments formulated in 2002 will open between 2007 and 2011.

Our premise for a continuation of the MA:IMI programme is that the 1st phase of the projects has resulted in a very practical support to the national authorities and to UNECE by collecting data on ageing specific indicators and in providing substantive research on salient issues faced by ageing societies in the UNECE region. The book “Mainstreaming Ageing: Indicators to Monitor Sustainable Progress” (edited by Bernd Marin and Asghar Zaidi) is just one latest example of the work generated in the 1st phase of the MA:IMI project. The construction of the Monitoring RIS website is another notable example, as it has resulted in a dissemination tool for the UNECE Secretariat as well as for national policymakers. An active participation of European Centre researchers in all MIPAA and RIS-related events in the last five years is another remarkable contribution to the cause of the Regional Implementation Strategy of the UNECE European region and in raising awareness and in developing capacity in member countries. All in all, the MA:IMI project has fulfilled its stated objective of providing “information resources to all actors interested in ageing issues and mainstreaming ageing into economic and social policies, from governmental to local authorities, as well as NGOs partners, media and the public at large”.

Here, we provide a very short overview of work proposed by the European Centre for the 2nd phase extension of the MA:IMI project. The European Centre wishes to undertake the tasks in

continued collaboration with the UNECE Secretariat and with support from as many governments as possible from the UNECE and EC Members States. Already in the very first, sounding-out phase of explorations in September / early October 2007, we have quite firm and promising informal commitments by about half a dozen governments of Member States, far beyond the initially supporting countries such as Spain, Germany and Austria, who made their continuous support conditional upon a broadening and “Europeanization” of support.

According to full-cost calculations, the European Centre has during the first review and appraisal cycle 2003 – 2007 invested around 110.000 € annually to top-up and supplement the 100.000 € of donations given by the Austrian Host Government. While it will also continue to spend some of its own basic endowment resources on the MA:IMI project during the second review and appraisal cycle 2008 – 2012, it will – as the other major initial donors – make its own continued commitment dependent on an increased interest and tangible commitments by other sponsors and, thus, by a reduced burden on its own scarce resources as well.

The work proposed for the 2nd phase is divided into several work packages, and this proposal provides some sketch of the work to be undertaken within each of these packages. The work package 1 reports on the work proposed for the collection of data on ageing-related indicators and the analyses based on these indicators. The second work package proposes further work to be undertaken on the Monitoring RIS webpage. The third work package is geared towards organisation of seminars, workshops and international conferences. The fourth work package will generate publications on the research undertaken during the project. The fifth, last but not least, package will generate information disseminations by publication of newsletters.

The work proposed will be undertaken during the next five years (2008-2012) and it will be staffed by one additional full time research analyst who will be fully devoted to the work of the MA:IMI project. The MA:IMI team will be further supported by the advice and the coordinating work of the Executive Director (Bernd Marin) and Director Research (Asghar Zaidi). The work on indicators will focus on the analyses of indicators already generated for the following four domains: Demography, Income and Wealth, Labour Market and Labour Market Participation, and Social Protection and Financial Sustainability. In addition, and more importantly, the 2nd phase of the MA:IMI project will design and develop indicators and collect corresponding data on gendering all Mainstreaming Ageing indicators as well as on long-term care and quality of life indicators.

Furthermore, the Knowledge and Information Management and Support Unit (KIMSU) of the European Centre will be involved in the webpage development and in generating newsletters alerts. Each year, the MA:IMI team will help organise a technical workshop to bring international experts together. Additionally, two international conferences will be organised and hosted by the European Centre to generate and disseminate scientific work for the MA:IMI project. The newsletters alerts will be generated monthly and they will contain summary of major pieces of ageing-related research as well as a synopsis of policy changes that affect older people of the current and future generations of older people. The total cost of the 2nd phase of the project will be (as in the 1st review and appraisal cycle) slightly above €200,000 per year, out of which the European Centre will contribute up to €100,000 per year from its own income.

I. WORK ON INDICATORS

One of the most notable achievements of the first phase of the MA:IMI project has been the definition and design of the indicators to monitor implementation of ageing-related policies. The work during the 1st phase has resulted in a list of indicators in the four most important domains: Demography, Income and Wealth, Labour Market and Labour Market Participation, and Social Protection and Financial Sustainability. The process of the choice of indicators has been rigorous as it involved consultation and agreement with international experts. These indicators have also been graphically illustrated and included in country-profile documents that will be available during November 2007.

However, the work produced so far has resulted in some indication of what ageing-specific challenges are currently faced by the UNECE member countries, and this work will need to be continued so as to observe main trends and link them to policy instruments common in these countries. It is also crucial to identify whether some good policy practices can be identified from our research on these indicators and their link to policies. In the second phase of the MA:IMI project, we propose to undertake policy analyses using data already generated, and this will provide comparative insights that will be critical for member countries to be aware of in designing and implementing policies.

In addition, and more importantly, the 2nd phase of the MA:IMI project will design and develop indicators and collect corresponding data on two additional domains: gender-specific mainstreaming ageing indicators and long-term care indicators. The project will also explore the potential of developing indicators on the quality of life of older people. More details on how we plan to develop indicators in these additional domains will be provided upon request.

II. WEBSITE DEVELOPMENT

After the first four years of the MA:IMI project and with the Ageing-related research undertaken at the Centre, we propose to review the website's objectives, target groups and the services that the European Centre offer with respect to the hosting and development of the Monitoring RIS website. In accordance with this review, we also intend to review our list of clients for this website and how information included in the website can be best obtained. We also need to think carefully who could best serve realigned purposes in the editorial committee.

From the work undertaken in reviewing the website, it is clear that many of the website readers find the current structure of the website somewhat complicated. Therefore we aim to implement the following measures to simplify the structure and communicate the content more effectively:

- Delete the local layer of the website (at present, there is nearly no content available);
- Merge Policies & Strategies with Implementation Activities (differentiating between both layers has been difficult and confusing for some people)

In the 2nd phase of the MA:IMI project, we aim to review how the information included in the website can be best obtained and then further disseminated. With all the experience of building, expanding and promoting the website during the 1st phase of the project, we are best placed to know about fields that are worth continuing to work on and the fields that need to be developed. More details on our work plan on the website hosting and its development will be provided upon request.

III. EVENTS ORGANISATION

Each year, the MA:IMI team will help organise a technical workshop to bring international experts together so as to discuss salient issues faced by ageing societies. These workshops will also contribute to the capacity development of the national governments and staff of international organisations (such as UNECE and UNFPA).

Additionally, two international conferences will be organised during the 5-year 2nd phase of the MA:IMI project. Each of these conferences will be hosted by the European Centre to generate and disseminate scientific work of the MA:IMI project and that of related projects from other organisations. These conferences, as well as workshops, will bring together relevant actors and will provide a platform for networking (NGOs, policy makers, scientists).

The European Centre will also organise many international seminars on ageing-related issues at the European Centre throughout the period of the MA:IMI project. The seminars will be organised so as to debate the impact of population ageing, and also discuss policymakers' considerations to ensure the fiscal and social sustainability of pension and social welfare systems. The debates to take place will highlight what opportunities there are in further reforming these systems in the UNECE member countries so as to prepare for future challenges of a continued ageing of the population.

IV. SCIENTIFIC PUBLICATIONS

The book “Mainstreaming Ageing: Indicators to Monitor Sustainable Progress” (edited by Bernd Marin and Asghar Zaidi) is a noteworthy example of the compilation of the scientific work generated in the 1st phase of the MA:IMI project. This tradition will be continued in the 2nd phase of the MA:IMI project. It is envisaged that two books will arise from the work contributed to two international conferences. In addition, we foresee a book on Women and Pensions also published during the 2nd phase of the project. There will also be publication of various policy briefs and working papers by the European Centre so as to highlight challenges faced by ageing societies of the UNECE member countries and what policy response can be identified as good practices. The papers presented in the technical workshops will also be published as working papers (in the form most useful to practitioners), and the seminar presentations will also be disseminated via notes on the website and the newsletters.

V. NEWSLETTER ALERTS

MA:IMI newsletter alerts will be used for awareness raising amongst the key stakeholders. They will report on new findings, website updates, new publications, interesting discussions in the international seminars, and on networking activities. These newsletters can be widely disseminated using proven European Centre partner channels. These newsletter alerts will be produced every three months, and thus they will provide a short, timely and precise way to disseminate relevant information to UNECE member countries. This will provide a regular information medium that bundles the MA:IMI services portfolio and it helps in building awareness of the issues faced and solutions sought in UNECE member countries.