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**Guidelines
for Reporting on National Follow-up
to the UNECE Regional Implementation Strategy (RIS)
of the Madrid International Plan of Action on Ageing (MIPAA)**

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Introduction

The report of the United Nations Secretary-General to the Commission for Social Development on the modalities for the review and appraisal of MIPAA (E/CN.5/2006/2) considers most relevant for countries to share information, experiences and good practices, draw conclusions and set priorities for future cooperation and technical assistance **primarily at regional-level review and appraisal exercises** organized by the regional commissions. It is expected that the regional commissions will elaborate concrete plans for conducting the review and appraisal exercises and convene regional conferences on MIPAA review and appraisal in 2007. The secretariat of the United Nations Economic Commission for Europe (UNECE) is engaged in this work, receiving support from the European Centre Vienna and from the Task Force for Monitoring MIPAA/RIS. The Government of Spain has proposed to host the Conference on Ageing in the UNECE region in autumn 2007.

The present guidelines are designed to assist Member States in reporting on the national follow-up to the UNECE Regional Implementation Strategy (RIS) of MIPAA. They are meant for national focal points on ageing and all the others involved in writing the report on the review and appraisal of national follow-up to MIPAA/RIS. It is hoped that the report outline provided in this document would help the focal point on ageing to organize existing as well as newly collected material into a concise report. The harmonised structure of country reports is also helpful for summarising ageing related developments across the region and for exchanging experiences between Member States. Information provided through these reports would form the basis for discussions at the 2007 UNECE Conference on Ageing.

It is suggested that the length of the report is 6000 to 8000 words (excluding annexes), including an abstract of 700-1100 words. **The deadline for submitting this report to the UNECE is 16 April 2007.**

For additional background information, you are referred to the following documents available through our website <http://www.unece.org/pau>:

- *Regional Implementation Strategy (RIS) of the Madrid International Plan of Action on Ageing*
http://unece.org/pau/age/berlin2002/docs/berl_ris_rev_e.pdf
- *Berlin Ministerial Declaration – A Society for All Ages in the UNECE Region*
http://www.monitoringris.org/documents/norm_reg/berl_md_e.pdf
- *Guidelines for the review and appraisal of MIPAA*
http://www.monitoringris.org/documents/imp_glob/Guidelines_draft_final_June.pdf
- *Note on the UNECE Conference on Ageing*
<http://www.unece.org/pau/age/focalpointmeeting/Note2007UNECEConferenceonAgeing.pdf>
- *Implementation of the Madrid International Plan of Action on Ageing in the UNECE Region*
http://unece.org/pau/age/focalpointmeeting/summary_report_questionnaires.pdf

Outline of the Report on the Follow-Up to the Regional Implementation Strategy (RIS) of the Madrid International Plan of Action on Ageing (MIPAA) in [country]

ABSTRACT

Please provide an abstract of 700 - 1100 words (depending on the number of priority areas chosen) according to the structure below.

Methodology used for this report, in particular the explanation of bottom-up participatory approach used (about 100 words)

Review and analysis of national progress in fulfilling the commitments of the RIS (about 200 words for each priority commitment; about 300 words in total for the remaining commitments)

Conclusion (about 100 words)

0. General Information

This introductory chapter should contain general information about the Member State that is submitting the report, in particular:

Country name

Name of and information about the author(s) of the report

Contact details for the author(s) of the report

Name of official focal point on ageing and contact details

Name, reference, and date of adoption or status of preparation of national strategy, action plan or similar policy document on ageing (please attach relevant documents in the annex).

1. Situation, Activities and Priorities Related to Ageing

a) *National ageing situation*

This first chapter includes an overview of the national ageing situation with respect to demographic, social, economic and political developments.

One of the key objectives of the reports is to allow Member States share good practices and different approaches to similar challenges and opportunities related to the ageing of their societies, deeply understanding the different contexts in which the latter evolves. Therefore, this chapter may consist of the following sections:

- *Presentation of **demographic indicators** that could help better understand the country's development regarding the issues discussed.*
- *Presentation of key quantitative social and **economic indicators** and features that may help to put into focus the issues treated and ease quantitative analyses.*
- *Brief description of the **social and political situation**, which may help to understand in which context ageing related issues are dealt with in your country*

You are invited to use the indicators developed in the European Centre Vienna [MA:IMI](http://www.euro.centre.org/detail.php?xml_id=81) project (http://www.euro.centre.org/detail.php?xml_id=81) for the above descriptions.

b) *Instrumental assessment*

This assessment should focus on **policies, laws and regulations** adopted and/or modified since the Berlin Conference (for instance, a new law on palliative care, etc.); on **programmes** established to adjust to demographic change (such as a new program for home care, etc.); on measures to adapt the **physical environment** (such as new housing or new transportation facilities for older persons); and on the allocation and rates of change per annum of **budgets** relevant for ageing related issues.

c) *Identification of areas for in-depth evaluation*

Based on the overview of the national ageing situation and the instrumental assessment, an identification of national priorities can be undertaken. These priorities reflect the main axes of intervention for your country and indicate which areas deserve an in-depth evaluation. These priorities would also be the subject of the short (max. seven minute) statement that your government delegation may wish to make at the Commission for Social Development in February 2007.

2. Methodology of In-Depth Evaluation of Identified Priorities

This chapter deals with the methodology for an in-depth evaluation of policy actions taken towards the implementation of MIPAA/RIS within the identified national priorities. It is suggested that both a quantitative and a qualitative approach be used for assessing the impact of policy actions.

Quantitative information can be taken from ongoing and new studies on ageing, both cross-sectional (assessing the impact of policies across several sectors) and longitudinal (observing a specific policy impact over a longer period of time).

Qualitative information can be obtained through a **bottom-up participatory approach**. Participatory approach refers to the involvement of older persons in assessing the impact of policy actions on the quality of their lives. This approach is flexible, as it can be adapted to country-specific challenges and opportunities.

This chapter should address interactions with the different stakeholders, such as ministries, NGOs, private sector, academia, older persons, and on how this contributed to the report. If applicable, the link of the review and appraisal of MIPAA/RIS to other established monitoring mechanisms in your country should be discussed here.

The national focal point on ageing is expected to organize the process of bottom-up participatory assessment. The focal point is encouraged to identify and engage one or more *facilitators* with the expertise of using a participatory methodology. Such facilitators could come from academia or non-governmental organizations for the participatory assessment.

3. National Capacities for Follow-up to MIPAA/RIS

This chapter analyses to what extent national capacities exist to ensure national follow-up of the commitments made by your country in the MIPAA/RIS. Issues to be analyzed could include:

- a) *institutional follow-up: what institutions are responsible for follow-up to MIPAA/RIS?*
- b) *organizations of older persons: do national organizations of older people take part in the follow-up activities?*
- c) *educational, training and research activities on ageing: what activities on education, training and research are undertaken in your country with regard to ageing?*
- d) *data collection and analysis: does the available data and research allow getting an adequate picture on ageing related situation in your country?*
- e) *mobilization of financial resources: what resources have been specifically dedicated to MIPAA/RIS follow-up?*
- f) *independent and impartial monitoring of progress in implementation: what are the monitoring mechanisms in place for the review and appraisal of MIPAA/RIS?*

4. Review and Appraisal by Subject Area

This part of the report is expected to be organized along the lines of RIS commitments. Most of the commitments are divided into *themes* with guiding *questions* on each theme, aligned with the content of the corresponding RIS commitment.

You are expected to report on all commitments, while focusing on one or more national priorities selected for in-depth review in your country. Reporting on these priorities is expected to address all the guiding questions pertaining to that area of priority. In other areas, you are expected to provide at least some information about related activities or reflect on their absence. In other words, more detailed information and analysis are expected in reporting on the priority areas selected for in-depth review, while less detailed information is expected on all other areas.

The report is expected to include evidence of **results and outcomes** that the described measures, programmes or initiatives have achieved, especially in the areas chosen for in-depth evaluation.

The structure provided for this part of the report should be seen as a framework for presentation of pre-existing and newly collected information and its analysis. The questions under each commitment are formulated to assist you in selecting and presenting relevant information. You may also wish to add other observations, as appropriate, to supplement the themes (issues) mentioned under each commitment.

RIS Commitment 1: Mainstreaming ageing

This chapter analyzes whether and to what extent mainstreaming ageing is part of national priorities. It reveals whether ageing is included in development plans and policy strategies on the national, regional and local levels. This specifically refers to RIS Commitment 1, which intends to mainstream ageing in all policy fields with the aim of bringing societies and economies into harmony with demographic change to achieve a society for all ages.

The analysis could focus on the following issues:

- a) *What are the areas in which ageing is mainstreamed and to what extent is this done?*
- b) *To what extent do the different policies related to ageing pursue a holistic approach and are coordinated and applied consistently?*
- c) *What initiatives has your country taken to tackle age discrimination? Which results have these initiatives achieved?*
- d) *What is the participation of older persons in the development of policies and strategies and in their implementation?*
- e) *To what extent are NGOs and the private sector involved in policy development and what is their role in the implementation of policies and programmes?*

RIS Commitment 2: Integration and participation of older persons

The Member States have committed to further enhance the social, economic, political and cultural **participation** of older persons.

- a) *What measures has your country undertaken to recognise, encourage and support the contributions of older people to society (e.g. media campaigns, school curricula)?*

- b) *What mechanisms has your country put in place to take into account the views of older persons on the services provided to them?*
- c) *How has your country encouraged the participation of older persons in society, culture, and economy?*
- d) *What activities have you undertaken to promote the political participation of older persons and in particular of older women?*
- e) *What mechanisms and organisations exist in your country to provide a political voice for older persons and how have they been promoted?*
- f) *Have you set up a national advisory body on ageing or a similar institutional mechanism that includes older persons to ensure a dynamic and coordinated contribution of older persons to national policy responses to ageing?*
- g) *Have you adopted policies and programmes to improve the housing and living environment of older persons especially in rural areas? This includes access to and affordability of services, such as housing, utility, sanitation and in particular transportation.*

Member States also committed to promoting the **integration** of older persons by encouraging their active involvement in the community and by fostering **intergenerational relations**.

- a) *What steps has your country taken to promote age-integrated communities where facilities are made available to people of all ages and where they can meet and interact (e.g. joint community centres for the elderly and the young)?*
- b) *How has your country promoted volunteer activities to enable younger and older people to interact and help each other?*

The RIS commitments also refer to the need to **promote a positive image of ageing**.

- a) *What steps has your country taken to promote a positive image of ageing (e.g. media campaigns, incentives for employers to promote continued employment of older persons, initiatives within local communities and with participation of other social actors to facilitate dialogue and a better understanding between the generations)? In this respect, it is important to promote a differentiated and heterogeneous view of the life of older persons to better reflect reality.*
- b) *What actions (in particular in cooperation with mass media) have been taken to encourage older persons to make the general public more aware of the positive aspects of ageing?*

RIS Commitment 3: Promotion of equitable and sustainable economic growth in response to population ageing

Member States committed to promoting **equitable and sustainable economic growth** in response to population ageing. Efforts should be made to raise the economic growth rates and productivity so as to increase available resources for transfer and distribution and to ensure the **financial sustainability of social protection systems** in general and pension schemes in particular.

- a) *What strategies has your country adopted to transform your economies with a view to eradicating poverty especially among older person?*
- b) *What measures has your country taken to review and adjust the macroeconomic policies to address the needs of a growing ageing population?*

RIS Commitment 4: Adjustment of social protection systems in response to demographic changes and their social and economic consequences

Member States committed to take steps to **ensure the financial sustainability of social protection systems** in the face of demographic ageing. They agreed that social security systems should strengthen incentives for citizens to participate in the labour force while protecting the weakest groups in society. Social protection systems should be adjusted so that they can fulfil their basic functions of safeguarding those who are deprived and covering those who are at risk. They need to be supported by high level of employment, comprehensive health services, functioning educational systems and active labour market policies.

In this regard, the Member States agreed to pursue the objective of preserving and strengthening the basic objectives of **social protection**, namely to prevent and/or reduce poverty and provide adequate benefits for all. In addition, the Member States agreed to adapt existing social protection systems to demographic changes and changes in family structures.

- a) *How has your country adapted social protection systems to societal and demographic changes?*
- b) *What steps has your country taken to achieve a sufficient income for all older persons?*
- c) *What policies has it adopted to address on time the needs of older persons for a variety of social and health services, including sheltered housing and long-term care?*
- d) *How has your country promoted standards of living for persons with disability and for fragile older persons that allow them to maintain their independence and dignity?*

Member States also committed to establishing a regulatory framework for occupational and private **pension provision**.

- a) *What steps has your country taken to establish or further develop a regulatory framework for occupational and private pension provision?*
- b) *Which changes have been implemented to the laws regulating mandatory retirement?*

Member States also pledged to pay special attention to the social protection of women and men throughout their life course.

- a) *What policies has your country adopted to ensure the equal treatment of men and women in social protection systems?*
- b) *What policies has your country adopted to ensure that social protection systems support a better reconciliation of work and family responsibilities throughout the life cycle (e.g. through special leave arrangements for working parents and other caregivers, or supportive measures such as respite care services (professional care services provided on an ad-hoc basis to give the regular caregiver some time off))?*

RIS Commitment 5: Enabling labour markets to respond to the economic and social consequences of population ageing

Member States committed to take measures to enable labour markets to respond to the economic and social consequences of ageing. In this regard, they pledged to seek increase in employment rates, especially the employment rates of older persons.

Has your country taken measures to promote access to employment opportunities and reduce unemployment rates especially for older persons, such as active labour market

policies (job-search assistance, training, counselling, etc.), adaptation of curricula to labour market needs, measures to ease the transition between formal education and work, efforts to reduce non-wage labour costs while protection workers' rights, easing of factors reducing demand for labour (e.g. too heavy administrative regulations, etc.)?

The Member States also agreed to improve the **employability of older workers**.

Has your country taken measures to improve the employability of older workers, e.g. through vocational guidance and training, promoting life-long learning (delivery of job-relevant training to enable workers to adjust to changing labour markets), improvement of working conditions?

Raising **participation rates** for all women and men is another commitment of the Member States.

- a) Has your country taken steps to raise participation rates in labour markets for all women and men, e.g. through removing barriers and disincentives to stay in employment?*
- b) Has your country taken specific measures to increase the labour force participation of women, e.g. through suitable education and training, measures to broaden their job opportunities and avoid discriminatory situations with regards to pension benefits or personal income?*

Member States committed to taking steps towards increasing the age at which people stop working and towards making **retirement** more **flexible** and **gradual**.

- a) Has your country taken steps to offer incentives for the participation of older persons in the labour market (abolishment of incentives to take up early retirement, abolishment of disincentives to stay in the labour market)?*
- b) What mechanisms has your country adopted to promote a smooth and gradual retirement?*

RIS Commitment 6: Promotion of life-long learning and adaptation of the educational system in order to meet the changing economic, social and demographic conditions

Member States committed to promoting life-long learning and adapting their educational systems in order to meet the changing economic, social and demographic conditions.

In particular, they committed to facilitate and encourage **life-long learning**.

- a) What steps have been taken to adjust education institutions to the needs of persons in retirement?*
- b) What initiatives has your country undertaken with respect to pre-retirement programmes?*
- c) What learning methods have been developed to teach older persons the use of new information technologies?*
- d) Has your country adapted educational curricula to prepare people to lives of continuous change and equip them with the necessary skills and attitude favouring flexibility? The use of which new didactic methods has been promoted in these regards?*

The Member States also committed to ensure that the **education system** achieves better **employability** of all persons.

- a) *Has your country taken steps to establish closer links between educational institutions and employers and to encourage employers to provide on-the-job training for workers of different ages, including older workers?*
- b) *What initiatives have been taken to increase school retention rates and limit dropouts?*
- c) *Have any special programmes been developed and/or promoted to facilitate the reintegration into the labour market of those who left early the formal educational system?*
- d) *Has your country taken steps to make formal schooling more gender-sensitive, e.g. through the introduction of gender-sensitive curricula, specific programmes for girls and women, and specific programmes for older women to help them re-enter the labour market?*

RIS Commitment 7: Striving to ensure quality of life at all ages and maintain independent living including health and well-being

The UNECE Member States committed to striving to ensure **quality of life** at all ages and maintain **independent living** including **health** and **well-being**. In particular, the Member States agreed to promote health and well-being over the entire **life course**, by mainstreaming health through sectoral policies.

What actions have been taken to integrate ageing issues into sectoral policies?

In addition, Member States committed to ensure **equal access** to health and social services including long-term care for persons of all ages.

- a) *What targeted measures have been taken to decrease inequalities in access to health and social services, including for people in rural and remote areas?*
- b) *What initiatives have been taken to improve long-term care services for older persons, in particular community-based services mostly demanded in order to overcome the mismatch between home services asked for as against residential care services supplied?*
- c) *How has your country improved the coordination and integration of services provided to older persons (e.g. through case management systems)?*
- d) *What efforts have been made to improve the training of care providers: professionals, volunteers and family members?*
- e) *What efforts have been made to improve the skills of older persons with regard to self-care, health promotion, prevention of disease and disability?*

Member States also committed to ensure appropriate **financing** of health and social services for persons of all ages.

What has been done to ensure efficient, equitable and sustainable financing of health and social services for persons of all ages?

In addition, Member States pledged to enable people to make healthy choices.

What measures have been taken to facilitate the adoption of healthy life-styles (e.g. information campaigns)?

RIS Commitment 8: Mainstreaming a gender approach in an ageing society to support families that provide care for older persons and promote intergenerational and intra-generational solidarity among their members

The Member States committed to mainstream a **gender** approach in an ageing society.

- a) *What measures have been taken to mainstream gender, to remove all obstacles to achieving gender equality, to eliminate all forms of discrimination against women, and to promote individual development of women throughout their entire life cycle?*
- b) *What has been done to give particular attention to collection and analysis of gender- and age-disintegrated data?*
- c) *What measures have been taken to promote the economic rights of women (such as legislation to ensure equal pay for equal work, to protect other women rights at work place, and to reconcile family life with work life, etc.)?*
- d) *Have social protection policies been reviewed to ensure full and equal participation of men and women in social protection systems?*
- e) *What measures have been taken to encourage and facilitate equal sharing of family and care responsibilities between women and men?*

RIS Commitment 9: Support for families that provide care for older persons and promote intergenerational and intra-generational solidarity among their members

The RIS describes the family as the basic unit of society. Member States committed to provide support to families that provide care for older persons and to promote solidarity among its members, to respond to the needs and changing roles of individual **family** members and strengthen **intergenerational and intra-generational solidarity**.

- a) *How has your country adjusted its family policies to changing demographic circumstances?*
- b) *What policies and programmes has your country adopted to respond to the needs of family members of different ages?*
- c) *What are specific elements of these policies and programmes to promote equality between men and women?*
- d) *Have you taken any awareness-raising measures concerning the contribution of older persons to family, community and society at large?*
- e) *Have you adopted measures to help families deal with the growing responsibilities of care for their older members?*
- f) *What mechanisms are in place to strengthen the role of communities, organisations and associations in providing support and care to older persons?*

Member States also committed to supporting the families in coping with the social and economic consequences of demographic change.

What measures has your country adopted to support families in coping with social and economic consequences of demographic change (e.g. support to care-giving families, family friendly policies and services; adaptation of the infrastructure of towns to the needs of families, and in particular the young and older persons, and to ensure that generations can live together; improvements in planning of services)?

RIS Commitment 10: Promotion of the implementation and the follow-up of the Regional Implementation Strategy through regional cooperation

UNECE Member States have the primary responsibility for the implementation and the follow-up of the RIS. They are encouraged to do so, among others, through regional cooperation, civil society involvement, and cooperation with the UNECE secretariat.

The analysis of your activities in this field could focus on the following questions:

- a) What activities have you undertaken to strengthen cooperation among UNECE Member States in the field of ageing (e.g. participation in meetings of the UNECE and the European Centre Vienna, exchange of information with Member States and the UNECE secretariat)?*
- b) How have you provided opportunities for civil society to cooperate in this process?*
- c) Have you requested the assistance of the UNECE secretariat and/or other entities of the United Nations system in the implementation of RIS? If so, what is your evaluation and how would you describe further needs for assistance?*

5. Conclusions and Outlook for the Future

This chapter is expected to

- a) briefly summarize to what extent your country has addressed the challenges and opportunities of ageing since the adoption of the MIPAA/RIS in 2002;*
- b) indicate, based on the assessment provided and in view of future demographic developments, future policy challenges and perspectives related to ageing;*
- c) indicate major strengths and weaknesses of your country in the field of ageing;*
- d) outline future activities in the areas of population and individual ageing and other related areas;*
- e) propose adjustments to existing policies;*
- f) identify priorities for further policy research;*
- g) indicate capacity-development needs;*
- h) describe the need and/or request for exchanges of experiences across countries;*
- i) indicate your requests/needs/wishes with regards to the work of international organizations in the field of ageing.*

Annex

1. List and contact details of organisations in your country directly involved in preparing this report.
2. List and contact details of organisations in your country involved the follow-up to MIPAA/RIS, by sector (government institutions, NGOs, academia, private sector).
3. Attach, if applicable, the national action plan on ageing and the relevant laws on ageing.