

**MINISTRY OF LABOUR AND SOCIAL AFFAIRS
STATE SECRETARIAT OF SOCIAL SERVICES, FAMILIES AND THE DISABLED
INSTITUTE OF OLDER PERSONS AND SOCIAL SERVICES
GENERAL SECRETARIAT**

SUMMARY OF NATIONAL REPORT

The political and administrative division of Spain in Autonomous Communities implies that the latter have been transferred several competencies in the field of social and healthcare services. This redefines the State's role of protection and of the coordination of the various public administrations.

The Institute for Older Persons and Social Services (IMSERSO), a Social Security managing body that belongs to the State Secretariat of Social Services, Families and the Disabled in the Ministry of Labour and Social Affairs, has been assigned, among others, competencies in the area of the older persons, as well as those that are derived from the creation and implementation of the system of protection of dependent persons, the development of policies and programmes related to active ageing. It is also a Focal Point and is therefore the Institution that is in charge of drawing up this report.

The methodology used in drawing up this report involved the gathering of direct information from the ministerial departments with competencies in some of the issues that have an impact on the ageing process, as well as consultation of their web pages and other official information.

As regards the participatory approach, it has been carried out by consulting the State Council of the Elderly, an interministerial collegiate body with advisory and consultative powers, whose purpose is to institutionalise the collaboration and participation of the older persons, channel their initiatives and demands to the General State Administration and inform and advise on the consultations that are formulated.

The IMSERSO, via its International Area, participates, among others, in the annual sessions of the UN Commission for Social Development. One of its priority objectives is the follow-up, examination and assessment of the Madrid International Plan of Action on Ageing (MIPAA), to which it contributes with various technical meetings on an annual basis, a meeting of the Focal Points on ageing of the UNECE (Segovia, 13-15 November 2006), various meetings to prepare the Regional European Conference of the UNECE, scheduled to take place in León on 6-8 November 2007, as well as the Civil Society Forum, a parallel event scheduled for 5th November 2007.

The first relevant issue of the situation in Spain as regards ageing is the increase in the population of older persons, especially in the population of very older persons (80 years and over), with an increase of 20.6 % among the men and 15.68 % among the women.

This phenomenon produces an economic impact on public expenditure and the need to make adequate forecasts in the areas of pensions, healthcare, care for dependent persons, education and unemployment. Due to this increase in population, there has been an increase in the activity of women and workers over the age of 55-64 years. On the other hand, due to this ageing of the population, a deceleration in potential growth is expected, an issue that is also taken into account when making forecasts.

The Social Security Reserve Fund was created in the year 2000 to attend future needs in the area of contributory benefits and has grown steadily since then.

In the last two years, the minimum pensions have increased by between 13.4 % and 16.6 %.

As regards the existing social resources, we should highlight the considerable increase that they have all undergone since the year 2002 (more than double in terms of day centres and remote assistance, for example, as may be seen in the general report)

On the other hand, in recent years, with the introduction of policies with a major social component, there have been several legal regulations that have had a wide-ranging and direct impact on the older persons. The following list summarises the most important of these policies:

[Act 35/2002, of 13th July, on measures for the establishment of a gradual and flexible retirement system.](#)

[Act 51/2003, of 2nd December, on equal opportunities, non-discrimination and universal accessibility for persons with disabilities.](#)

[Act 42/2003, of 21st November, on the Amendment of the Civil Code and the Civil Procedure Act in the Area of Family Relations between Grandchildren and Grandparents.](#)

Organic Act 1/2004, of 28th December, on Comprehensive Measures to Protect against Gender-Based Violence.

[Royal Decree 1611/2005, of 30th December, on the revaluation of the pensions in the Social Security system and other public social benefits for the financial year 2006.](#)

Order of the Public Administrations to promote Conciliation between personal and work life APU/3902/2005 (Spanish Official State Gazette [B.O.E.]16/12/2005).

Act 39/2006, on the Promotion of Personal Autonomy and Care for Dependent Persons, promoted by the IMSERSO and with competencies in the implementation of same.

[Royal Decree 1578/2006, of 22nd December, on the revaluation of the pensions in the Social Security system and of other public social benefits for the financial year 2007.](#)

Organic Act for Effective Equality between Women and Men (Spanish Official State Gazette [B.O.E.] no. 71, of 23/03/2007).

Therefore, as may be seen, the development of training in Spain and in the initiatives intended to meet the needs of the older persons over these 5 years have experienced significant progress. It is also necessary to highlight the importance of our country in promoting and supporting the follow-up and application of the recommendations of the Second World Assembly on Ageing and the Ministerial Conference of Berlin, which will culminate with the assessment at the Ministerial Conference on Ageing, scheduled to take place in León between 6th and 8th November 2007.

Sent to the Vice-Directorate and State Council on the Elderly on 29-4-07, to be answered before 4th June

1.- SITUATION, ACTIVITIES AND PRIORITIES RELATED TO AGEING

a) National situation as regards ageing

- *Demographic indicators*

According to the IMSERSO Observatory on the Elderly, one of the most significant demographic phenomena that has occurred in our country during the period covered by the Report is the increase in the population of older persons and within the latter, the very significant increase in the population of very older persons (aged 80 years and over). Thus, for example, between 2002 and 2006, there was a 20.6 % increase in the number of males over the age of 80 years and a 15.68 % increase in the number of females in the latter age bracket. The following graphs illustrate this situation.

POPULATION ACCORDING TO SEX AND AGE, 2002

100 years and over

Males

Females

Source: INE. Municipal register of inhabitants on 1st January 2006. INE 2002.

POPULATION ACCORDING TO SEX AND AGE, 2006

100 years and over

Males

Females

Source: INE. Municipal register of inhabitants on 1st January 2006. INE 2002.

INCREASE IN POPULATION AGED 65 YEARS AND OVER AND 80 YEARS AND OVER, ACCORDING TO SEX, 2002-2006

80 years and over

65 years and over

Both sexes

Males

Females

Source: INE. Municipal register of inhabitants on 1st January 2002 and 2006. INE 2002.

INCREASE IN POPULATION AGED 65 YEARS AND OVER AND AGED 80 YEARS AND OVER, AC

	2002	2006
65 YEARS AND OVER		
Both sexes	7,169,435	7,484,392
Males	3,021,413	3,164,529
Females	4,148,022	4,319,863
80 years and over		
Both sexes	1,683,041	1,974,823
Males	567,896	684,861
Females	1,115,145	1,289,962

Source: INE. *Municipal Population Register on 1st January 2002 and 2006.* INE 2006

- ***Key Indicators and quantitative economic and social characteristics.***

The public expenditure proposals drawn up by the EU provide information that is comparable at European level on the impact of demographic change on public expenditure as a percentage of GDP. They include five categories of expenditure: pensions, health, care for the dependent, education and unemployment; use demographic and macroeconomic hypotheses that have been agreed upon by the Member States and assume that there have been no changes in economic policy.

In the macroeconomic scenario agreed upon until 2050, Spain is the country in the European Union in which the activity rate will increase the most in the period 2004 – 2050, with the exception of Cyprus. This is due to the important **increase in the Activity of females and older workers (55-64 years)**. It is also the country in the EU15 in which the unemployment rate will drop the most during the period for which the forecast has been made (-3.4 p.p. compared to 2005). Despite the fact that the number of workers employed would increase by 23 % between 2003 and 2025, it would then drop by 22 % in the period between 2025-2050 (the largest drop in the EU15 in this second period), meaning that the total variation is -3.8 % during the whole period.

One of the most significant results is the **deceleration in potential growth due to the ageing effect**. Thus, during the period for which the forecast has been done, the potential growth rate is divided by two in EU25, dropping from 2.4 % to 1.2 %. **In the case of Spain**, due to the higher drop in the contribution from employment projected at the end of the period, **this deceleration could be more acute**.

- ***Social and Political Situation***

The Spanish Constitution of 1978 saw the commencement of a process of modernisation, reconciliation and political transformation that laid optimum foundations for us to take up position at the same level as other European countries.

- *Spain is a social democratic State governed by the rule of law.*
- *The political form of the Spanish State is a Parliamentary Monarchy.*

Spain is a Member State of the European Union and was one of the founding countries of the euro, the European single currency. As well as its membership of the European Union, Spain also places great importance on its transatlantic connection with Iberian America.

In the political and administrative sphere, Spain is divided into sixteen Autonomous Communities, as well as Ceuta and Melilla.

An Autonomous Community is a territorial entity within the constitutional system of the Kingdom of Spain that has been granted legislative autonomy and executive competencies, as well as authority for self-administration via its own representatives.

The policies on ageing that are intended for the provision of social and healthcare services for the older persons have been developed at an intense rate since the democratic transition in a political-administrative context of shared competences between the Central State and the Autonomous Communities. The social and healthcare decentralisation propitiated the emergence of the City Councils as major actors in social protection, reinforcing and legitimising the Autonomous Communities, required intense redefinition of the protective role of the State and major coordination between the representatives of the various public administrations.

As explained previously, the age pyramid is undergoing a change in shape and becoming a pillar (Imsero, 2000). However, in recent years, the fertility rate seems to be in a phase of slight recovery, but we should bear in mind that this fact may be due to the conjuncture. The role of immigrants in the recovery of the birth rate and therefore in slowing down the ageing process does not appear to be sustained in time, because for this to be the case, an intense flow of entry of immigrants would have to continue, which does not seem possible with the increasingly restrictive Spanish migratory legislation. On the other hand, although their fertility rate is currently higher than that of the autochthonous population, it will tend to even out, in accordance with the behaviours of immigrant populations in other countries in the European Union.

In geographical terms, all of the Autonomous Communities are ageing and only Andalusia, Murcia and Madrid have rates that are lower than 14 %, the first two because of the slower drop in the birth rate and Madrid because it receives immigrants from other regions and foreigners. The Communities with the most aged populations, with ageing rates of more than 20 %, are Aragon and Castile-Leon, traditionally regions with high emigration which has contributed to the fast drop in the birth rate.

b) Instrumental assessment

We shall now provide a list of some of the regulations that have been approved and which we consider to be significant among the political measures carried out in the period under study.

Act 53/2002, of 13th July, on measures for establishing a gradual and flexible retirement system.

Act 51/2003, of 2nd December, on equal opportunities, non-discrimination and universal accessibility of disabled persons.

Act 42/2003, of 21st November, on the Amendment of the Civil Code and the Code of Civil Procedure in the Area of Family Relations between Grandchildren and Grandparents.

Act 1611/2005, of 20th December, on the revaluation of the pensions in the Social Security system and other public social benefits for the financial year 2006.

Act 39/2006 on the Promotion of Personal Autonomy and Care for Dependent Persons.

Royal Decree 1578/2006, of 22nd December, on the revaluation of the pensions in the Social Security system and other public social benefits for the financial year 2007.

For the description of care for the older persons, we shall now present the graphic representation of the social resources existing for older people in 2002, compared to the most recent data available to us. As may be seen, there has been a considerable increase in these resources in recent years.

Graphs depicting the number of vacancies and coverage rates for the following resources:

- Home Help Service
- Remote Assistance
- Day Centres
- Residential Homes

Evolution of some Social Services for older persons in Spain. Number of Vacancies 2002-2006

Home help service

Remote assistance
Day centers
Residential homes

Source: Observatory on the Elderly with data from the Ministry of Labour and Social Affairs (2000, 2002, 2005). The Older Persons in Spain. Report on 2002 and 2004 and Autonomous Communities, Autonomous Cities and Foral Diputations.

**Evolution of some Social Services for older persons in Spain.
Coverage rate 2002-2006**

Home help service
Remote assistance
Day centers
Residential homes

Source: Observatory on the Elderly with data from the Ministry of Labour and Social Affairs (2000, 2002, 2005). The Older Persons in Spain. Report on 2002 and 2004 and Autonomous Communities, Autonomous Cities and Foral Diputations.

	Home help service	Remote assistance	Day centers	Residential homes	Total
2002	197.306	104.313	18.639	239.761	560.019
2006	305.801	261.433	47.624	298.870	913.728

Source: Observatory on the Elderly with data from the Ministry of Labour and Social Affairs (2000, 2002, 2005). The Older Persons in Spain. Report on 2002 and 2004 and Autonomous Communities, Autonomous Cities and Foral Diputations.

c) Identification of the spheres for thorough assessment

In the last two years, Spain has created 1.7 million jobs. The unemployment rate is lower than the European average. The minimum pensions have increased by between 13.4 % and 16.6 %. The government has enacted legislation against gender-based violence and also an Act to promote Personal Autonomy and Care for Dependent Persons.

With a view to the future, cooperation and advisory programmes at international, European and national level and involving all spheres of administration, units specialising in issues related to ageing and civil society will be of crucial importance.

The IMSERSO (Spanish Institute for Older Persons and Social Services) is the public body that is competent in the area of ageing and the following may be highlighted among its lines of activity:

- Non-contributory pensions, benefits and subsidies
- State-run Centres for specialised care and/or research
- Promotion of Personal Autonomy and Care for Dependent Persons.
- Promotion of Active Ageing
- Innovation and technical support programme
- International Cooperation

One top level priority for the IMSERSO is the follow-up and assessment of the **Madrid International Plan of Action on Ageing (MIPAA) and of the Regional Implementation Strategy (RIS) in collaboration with the United Nations and its specialised Agencies** as the basis on which future Policies and initiatives on ageing are built.

Another priority is the development of the System of Autonomy and Care for Dependent Persons (SAAD) at national and Autonomous Community levels. The IMSERSO is advising the Spanish National Statistics Institute (INE) for the new INE survey on Disability, Personal Autonomy and Situations of Dependency 2007 (EDAD).

As well as the above activities, the IMSERSO considers that it will also be necessary to reinforce all of the training and research activities that will be carried out in the coming years on the subject of dependency.

As regards active ageing, the emphasis will be on the following programmes in particular:

- To continue to reinforce healthy ageing.
- To continue insisting on training both for professionals and for the older persons themselves.
- To reinforce and carry out initiatives to ensure full awareness of the rights of the older persons, both among professionals and among the older persons themselves.
- To continue to study and analyse intergenerational relations.

2.- METHODOLOGY OF THOROUGH ASSESSMENT OF PRIORITIES IDENTIFIED

The quantitative information that is presented in the National Report has been taken from official studies, investigations and publications on ageing. The IMSERSO has received the data used for this Report from the following: Vice-Directorate General of Management, Vice-Directorate General of Planning, Classification and Assessment, the Gerontological Plan and the Observatory on the Elderly.

The qualitative information has a participative bottom-up approach. The IMSERSO includes the State Council on the Elderly. The State Council on the Elderly is an interministerial collegiate body that provides advisory and consultancy services to the General State Administration and is seconded to the Ministry of Labour and Social Affairs.

The purpose of the State Council on the Elderly is to institutionalise the collaboration and participation of the older persons in defining, applying and following up on the policies of care, social insertion and quality of life aimed at this sector of the population in the field of the competencies assigned to the General State Administration. It channels the initiatives and needs of the older persons towards the General State Administration. It advises and informs on the consultations that are formulated by the Ministerial Departments and Institutions in areas that affect the conditions and quality of life of the population of older persons.

3.- NATIONAL CAPACITIES FOR FOLLOW-UP ON THE MIPAA AND THE RIS

Institutional Follow-up: the Institution in charge of follow-up on the MIPAA and the RIS is the IMSERSO, via the International Area.

The IMSERSO is a Social Security management body that belongs to the State Secretariat of Social Services, Families and the Disabled in the Ministry of Labour and Social Affairs. The IMSERSO has been assigned competencies in the area of the older persons, including those that are derived from the creation and implementation of the system of protection for the dependent and the development of policies and programmes related to the active ageing of the population. It is also in charge of managing the complementary social services in the Social Security system and of managing the plans, programmes and services at state level for the older persons and the dependent persons.

- The IMSERSO is in charge of proposing and enforcing, where applicable, the functions assigned in article 9.1.a) of Royal Decree 1600/2004, of 2nd July, which describes the basic organic structure of the Ministry of Labour and Social Affairs, in particular *“The planning and basic regulation of the acknowledgement of the right to personalised help for all dependent persons, guaranteeing a system of services that is universal, integrated and uniform”*.
- Reinforcing cooperation with the organisations and entities that represent the older persons.
- Establishing and managing specialised care centres or centres that are assigned special research objectives at state level in the field of action of the Institute.
- Proposing, managing and following up on social services plans at State level in the area of the older persons and the dependent persons.
- Relations with foreign and international bodies and technical assistance to international cooperation programmes on areas and with groups related to its scope of action.

The Institute of Older Persons and Social Services is structured in the following bodies:

- Participation in control and monitoring of management:
 - General Board
 - Executive Committee
- Management.
 - Directorate-General
 - General Secretariat
 - Vice-Directorate General of Planning, Classification and Assessment
 - Vice-Directorate General of Management
 - Vice-Directorate General of Budgetary Analysis and Financial Management

The IMSERSO carries out the following initiatives, among others:

- Personal Autonomy and Dependency
- Active Ageing
- R+D+ i and Studies
- Training
- International Relations
- Benefits, subsidies and grants
- Centres

The IMSERSO also has the Observatory on the Elderly, which recompiles and publishes data on social services for the older persons on an annual basis. The *Portal Mayores* (Older Persons' Portal) (www.imsersomayores.csic.es) is a scientific portal that may be accessed free of charge, specialised in Gerontology and Geriatrics and developed since 2002 by the Spanish National Research Council (CSIC) and the Institute of Older Persons and Social Services (IMSERSO). This portal is currently the leading international portal in the Spanish language on issues related to geriatrics and gerontology with an annual average of more than three million and half visits per annum (45 % of which from other countries) and over ten million pages visited.

4. REVISION AND ASSESSMENT ACCORDING TO THEMATIC SPHERES

COMMITMENT 1: To integrate ageing

The Ministry that has been entrusted the majority of the competencies in the area of ageing is the Ministry of Labour and Social Affairs, especially via the Institute of Older Persons and Social Services (IMSERSO)

As regards a holistic approach, apart from the **Plan of Action for the Elderly 2003-2007**, on a national scale, which is promoted by the IMSERSO and pending assessment in this year, other Ministries contribute towards integrating a cross-disciplinary perspective of ageing.

Ministry of Labour and Social Affairs

Bearing in mind the need of a global and integrated strategy related to ageing, as pointed out by the MIPAA and the RIS, the Spanish system has been participating actively in order to tackle, together with other political instances and strategies, the challenges and opportunities linked with the population ageing process:

To meet those challenges, the Spanish system:

- Applies measures to consolidate the sustainability in the long run of the Social Security System and, concerning employment, measures to elongate the active life.
- The Spanish pension system is adapting to new changes related to ageing, as contemplated in the Employment strategy and Labour Market reforms which have been recently taken as a consequence of the Agreements reached by the Government in the frame of the social dialogue and from a life-span and active ageing perspectives for the gradual process of reforms in the frame of the Recommendations adopted in the Toledo Agreements.

In this respect, last year an agreement has been reached in order to, among other things, reinforce the contributory nature between benefits and contributions all along the labour life, to reinforce the guarantees of revenues for older persons in their old age. This last aspect can be included, moreover, within the Spanish National Plan of Inclusion 2006-2008.

As for the participatory aspects, it should be highlighted that the whole process of reforms in pension matters enters the social dialogue process which has been set up on a permanent basis.

One might say that the new integrated process, established by the EU in the framework of an open method of coordination in participation and social inclusion matters is going to encourage even more the coordination of mainstreaming approaches in ageing concerns for they converge in the same process of action.

Ministry of Science and Technology

- Equal opportunities. Initiatives to promote access to the information society. Programmes in rural areas or in settlements with limited resources.
- Promoting the elimination of architectonic barriers, providing technical aids and access to new technologies.
- The National Plan on R+D+i in the area of ageing has been promoted, as well as other research via the Observatory on the Elderly

Ministry of Education and Science

- Measures to promote a correct image of old age and educational programmes in the context of intergenerational relations.
- Promoting a positive approach to ageing, providing access to culture and cultural goods, specific initiatives in rural areas, improving the image of ageing in society.
- Promoting gerontological research via the Observatory on the Elderly

Ministry of Development

- Measures to promote autonomy by means of accessibility plans: development of regulations, implementation of legislation at Autonomous Community and local levels, coordination and dissemination of same.
- Incorporating recommendations on accessibility. Promoting the adaptation of private homes and public buildings.

Ministry of Economy and Treasury

- Initiatives aimed at incorporating the recommendations of the Accessibility Plan

Ministry of Internal Affairs

- Measures to protect the older persons, by locating persons or groups that are vulnerable because of loneliness or isolation, information courses on the most frequent crimes, legal and regulatory support to consolidate a Road Safety system with special measures for the older persons.
- Programmes for detecting, assessing and eradicating abuse of the older persons.

Ministry of Justice

- Programmes for detecting, assessing and eradicating abuse.
- Legal Protection, awareness of general legal principles linked to personal dignity, personal autonomy and equality before the law.

Ministry of Health and Consumption

- Organisation of campaigns and implementation of programmed related to health, with specific programmes for women.
- Introduction of legal and ethical issues in the training of professionals, in order that they may exercise the ethical and humanist contents acquired in all areas of the sector.
- Common Protocol for Healthcare in Cases of Gender-Based Violence (23rd April 2007)

The participation by the older persons in the development of the policies and strategies and the implementation of the latter in Spain is channelled via the **State Council on the Elderly**.

COMMITMENT 2: Integration and participation by the older persons

The IMSERSO promotes a positive image of the older persons via various publications (magazines: 60 y Más, Profiles, Links..., studies...), training courses, for example, aimed at professionals from the printed press and television, dissemination campaigns, etc..

As regards the mechanisms in place for taking into account the opinions of the older persons and other issues of relevance in Spain, as explained previously, this work is mostly done via the **State Council on the Elderly**. The members of the council are the representatives from Spanish non-governmental organisations working with the older persons. The council is an interministerial collegiate body that provides advisory and consultancy services to the General State Administration, seconded to the Ministry of Labour and Social Affairs. For example: on the occasion of the drawing up and implementation of the Dependency Act, a consultative group was created within the State Council on the Elderly.

The creation of associations is promoted by the following, among other measures: by subsidising the entities or programmes that carry out initiatives on behalf of the older persons. It is regulated via the Spanish Official State Gazette (B.O.E.), specifying the objectives to be met.

By means of Collaboration Agreements between the IMSERSO and other entities such as Universities, programmes such as the one undertaken with the Autonomous Community of Extremadura, which was on intergenerational relations and carried out in Primary Schools, have been funded.

IMSERSO has generated regulations on issues regarding accessibility in the home, public services and transport. For example, as regards public transport, with adapted buses, which have obtained optimum results and which have also proven to be of benefit to other groups such as pregnant women or those travelling with children's prams and pushchairs.

COMMITMENT 3: To promote fair, sustainable economic development in response to the ageing of the population.

According to the Spanish Ministry of Economy and Treasury, one of the priorities in the area of Ageing consists basically of promoting the sustainability of public finances, safeguarding the sufficiency of pensions.

The Spanish Social Security System is sustainable enough considering the following items: First, the founding is divided into two different kinds: contributory and non-contributory and the sanitary assistance and social services are understood as citizenship rights to be financed by the general system; secondly, the growing numbers of jobs generated in our country during the last years as well as the important number of migrants that have joined our productive fabric in the frame of the recent process of normalization of migration, has caused an important drop in the submerged economy; third, the maintenance of the effective taxation over real salaries, compatible with very intense processes for the increase of contributors; fourth, the retirement age in Spain is over the average in Europe and lastly, the configuration and consolidation in the last years of a Global Reserve Fund of 40.335 millions €, close to a 4% of the GPD, equivalent to eight months payment of pensions, with the aim of sustaining the Pension System for an adequate management of the demographic evolution related to the ageing process of the Spanish population.

The Spanish government has committed itself to increase in the present legislature (2004-2008) in a 26% the minimum amount of the pensions, which has already been partly accomplished in the first three years with increases between 19,7% and 24,9%.

Within the European Union, in particular, the European Commission and the Working Group on Ageing in the Economic Policy Committee in the EU Council have drawn up forecasts regarding the public expenditure associated to ageing.

These forecasts provide information that is comparable at European level, regarding the impact of demographic change on public expenditure as a percentage of GDP. They include five categories of expenditure: pensions, health, care for the dependent, education and unemployment; use demographic and macroeconomic hypotheses that have been agreed upon by the Member States and assume that there have been no changes in economic policy.

Table 1 depicts the **results of the complete expenditure forecasts for Spain**. The expenditure will jump from 20 % in 2005 to 28.6 % of GDP in 2050, whereas the pensions will be the main reason for the increase in expenditure, followed by spending on healthcare. Public expenditure on pensions will go up from the 8.7 % of GDP forecast for 2005 to 15.7 % in 2050, mainly as a consequence of the increase in the dependency rate (population aged over 65 years in terms of the population of working age), which will go from 24.6 % in 2004 to 65.6 % in 2050, an increase that is much higher than the European average, which will increase from 24.5 % to 51.4 %.

Table 1						
SUSTAINABILITY OF PUBLIC FINANCES IN THE LONG TERM						
(% GDP)						
	2005	2010	2020	2030	2040	2050
Total Expenditure on Contributory Pensions (1+2)	8.7	8.9	9.3	11.8	15.2	15.7
Expenditure on Contributory S.S. Pensions*(1)	7.8	8.1	8.5	11.0	14.4	15.2
Retirement and early retirement pensions	5.2	5.2	5.5	7.7	10.9	11.8
Disability	0.9	1.0	1.1	1.2	1.2	1.1
Survival	1.7	1.8	1.9	2.1	2.3	2.3
Passive Categories (CPE) (2)	0.8	0.8	0.8	0.8	0.7	0.5
Expenditure on healthcare	6.1	6.3	6.7	7.3	7.9	8.3
Expenditure on care for the dependent	0.5	0.5	0.5	0.5	0.6	0.8
Expenditure on education	3.6	3.2	3.2	3.0	2.9	3.1
Expenditure on unemployment	1.1	0.9	0.7	0.7	0.7	0.7
Total expenditure associated to ageing	20.0	19.7	20.4	23.4	27.3	28.6

HYPOTHESES						
Growth in work productivity	0.8	1.6	2.0	1.7	1.7	1.7
Actual growth in GDP	3.1	2.8	2.0	1.0	0.4	1.0
Activity rate for men (20 to 64)	85.6	86.9	87.9	87	86.1	87.8
Activity rate for women (20 to 64)	61.5	66.4	72.2	73.5	73.4	74.9
Activity rate for older p. (55-64)	45.1	47.9	57.8	63.3	63.5	63.9
Total activity rate (20 to 64)	73.6	76.7	80.2	80.3	79.9	81.5
Unemployment rate	10.4	8.7	7.0	7.0	7.0	7.0
Population aged over 65 years in terms of the population of working age	24.5	25.3	29.8	38.2	52.5	65.6

* Includes minimum pensions

Source: Basic Scenario of the Report on Forecasts of Public Expenditure associated to the Ageing of the Population, CPE and the Commission, 2006. Update of the Stability Programme in Spain, 2006.

Economic policy strategy

In order to meet the expected increase in expenditure associated to ageing, the economic policy strategy has to tackle the following two aspects:

- Budgetary stability, which allows to reduce the public debt ratio in terms of GDP and increase contributions to the Social Security Reserve Fund.
- Revision of the pension, health and care for dependency systems.

• ***Budgetary stability and the Social Security Reserve Fund***

The national fiscal rules on the budgetary balance were recently changed by the reform of the **Budgetary Stability Acts** approved in May 2006¹, in force on 1st January 2007. This reform reinforced budgetary stability by giving a real stabilising nature to the national fiscal rules and introducing more transparent criteria and procedures in order to guarantee that it would be applied by all of the administrations.

In accordance with the Update of the Stability Programme 2006, commitment with budgetary stability is evident both in terms of the **surplus** assumed until 2009 and in the continued drop in the burden of public debt on GDP, both of which are more ambitious objectives than mere compliance with the Stability and Growth Pact. A surplus of 1.0 % of GDP is forecast for all of the Public Administrations in 2007, i.e. 3 decimal points more than what was indicated in the objectives approved in June, whereas the surpluses from the years 2008 and 2009 are revised one decimal point upwardly, reaching 0.9 % of GDP in both years.

¹ The new fiscal framework is composed of Act 15/2006 which amended General Act 18/2001 on Budgetary Stability, Organic Law 3/2006 which amended Organic Law 5/2001 which was complementary to the General Budgetary Stability Act.

The **public debt/GDP** ratio follows a clearly downward trend throughout the aforementioned period, this reinforcing the consolidation of public finances as regards future challenges, especially those that are associated to the ageing of the population. Thus, it is estimated that between 2005 and 2009, the debt ratio will be reduced by approximately 11 percentage points of GDP to stand at 32.2 % at the end of the period.

	SEC Code	2005	2005	2006	2007	2008	2009
		Level (mill. €)	% GDP				
Capacity (+)/Need (-) for Funding (EDP. B9)							
1. Total Public Administrations	S.13	10.239	1.1	1.4	1.0	0.9	0.9
2. Central Administration	S. 1311	4.102	0.5	0.6	0.3	0.3	0.3
3. Autonomous Communities	S. 1312	-2.729	-0.3	-0.1	-0.1	0.0	0.0
4. Local Corporations	S.1313	-971	-0.1	-0.2	-0.1	0.0	0.0
5. Social Security Administrations	S. 1314	9.837	1.1	1.1	0.9	0.6	0.6

Source: Update of the Spanish Stability Programme, 2006.

The surplus in Social Security has translated as new contributions to the **Social Security Reserve Fund (FRSS)**, which was created in the year 2000 with the aim of meeting future needs in the area of contributory benefits and which has undergone extensive growth since then. In 2007, according to the Budgets Act, the FRSS is offered an additional 6,401 million euros additionally, meaning that the amount that is accumulated as savings (which was 35,741 million euros in October 2006) will reach a total of 42,142 million euros, which is equivalent to 8 months of pension payrolls or 4.0 % of GDP. The percentages of the various types of assets that make it up, according to the market prices, are detailed in Table 3.

	%
Balance in current account in Bank of Spain	1.3
Spanish Treasury Bills	0.6
Spanish Treasury Bonds and Debentures	56.6
Foreign Government Bonds	41.5

Source: Update of the Spanish Stability Programme, 2006.

- *Reform of the pensions system (see commitment 4)*
- *Control over healthcare expenditure*

As regards the rationalisation of expenditure in healthcare, the measures foreseen for improving the management and funding of the Spanish National Health Service have been adopted:

- Approval in March 2006 of the **Quality Plan of the Spanish National Health System** drawn up in collaboration with the Autonomous Communities, including 189 measures and a budget of 65 million euros. The initiatives in this Plan improve the quality and cohesion of the system,

promoting healthy living habits, reducing inequalities in health status, particularly between men and women, supporting the planning and development of the human resources in the healthcare system, promoting clinical excellence by means of assessment and leveraging the information technologies in order to improve the healthcare service by means of the programme “Sanidad en Línea” (Health Online) under the auspices of the AVANZ@ Plan.

- Approval in June 2006 of the **Act on Guarantees and Rational Use of Medicines and Healthcare Products**, which promotes the efficient use of resources via measures to make the prescription and consumption of medicines more efficient and measures to lend stability and regulatory certainty to the system. This Act will represent savings for the Spanish National Health System and **it will contribute**, along with the rest of the initiatives included in the Strategic Plan on Pharmaceutical Policy, **to maintaining the moderation in pharmaceutical expenditure** started at the beginning of the legislature. Thus, pharmaceutical expenditure increased by 12.1 % in 2003, 6.4 % in 2004 and 5.6 % in 2005 and has continued in this line of moderation in 2006.
- ***Regulation of the inverse mortgage in dependency insurance policies***

Currently a Draft Act, this regulation is intended to regulate private instruments to cover situations of dependency and the new inverse mortgages, with the objective of **improving the wellbeing of the older persons on the basis of the real estate property that they own**. In this regard, the Draft Act that amends Act 2/1981, of 25th March, on the regulation of the mortgage market and other ruled applicable to the mortgage and financial system has been passed. It regulates inverse mortgages and dependency insurance and is now classified as a taxation regulation, in compliance with Act 39/2006, of 14th December, on the Promotion of Personal Autonomy and Care for the Dependent.

COMMITMENT 4. To adapt the social protection systems in response to demographic changes and their social and economic consequences

Spain has adapted changes in the social protection systems in response to the social and demographic challenges posed by ageing. The objective is to promote the sustainability of public finances, safeguarding the sufficiency of the pensions (see tables 1 and 2).

- ***Reform of the pension system***

The Agreement on measures in the area of Social Security, which was signed on 13th July 2006 and some of whose main measures are currently being discussed in Parliament, constitutes a step forward in the process of reforms that is necessary in order to reinforce the system from a financial perspective in the long term, according to the principles of contribution, solidarity and sufficiency. The most important measures are as follows:

- Greater correspondence between contributions and services in determining retirement pension. Accreditation of 15 years of effective contribution is required, compared to the current requirement of 12.6 years.
- The arrangements for retirement before the ordinary retirement age are rationalised. The minimum reference age for all forms of early access to retirement, including partial retirement, is set at the age of 61 years.
- Guarantee of correct ratio between the System’s income and expenditure, ratifying the objective of achieving by 2013 the process of separation of sources of funding, with full

funding of minimum bonuses in contributory pensions from the general levy (the State's increasing contributions to this funding totalled 31.4 percent of same in 2006).

- Measures aimed at providing incentives for **prolonging active life**. Every year that retirement is postponed beyond the age of 65 years will mean an increase of 2 % in general and 3 % when more than 40 years of contributions have been made. The discounts in company contributions to Social Security, which were already available in the case of those over the age of 60 years with a seniority of 5 years have been extended to those that are over 59 years of age. Partial retirement is rationalised: access is via a period of minimum contribution in the company for 6 years and a 30-year contribution period. The maximum (from 85 % to 75 %) and minima (from 15 % to 25 %) of the worker's usual working time is altered. These requirements shall come into force gradually over a 4-year period.
- Reduction in the number of schemes, thus simplifying the structure of the system so that it is organised around two systems: the scheme for self-employed workers and the scheme for workers employed by third parties. For these purposes, the integration of farmers in the above schemes is being articulated. Moreover, measures are planned for adapting and modernising the regulations governing other special schemes.
- Introduction of elements of contribution in the permanent disability pension, which is calculated according to the contributory effort made. The system for determining the amount of the permanent disability pension due to common illness is altered. The amount is applied a percentage for years of contribution just like the one that is used to calculate retirement, thus avoiding this being used as a means of accessing protection for careers in which the number of years is insufficient.
- The replacement income category is recovered for widowhood pensions and its scope of application is extended to civil partnerships.

COMMITMENT 5: To equip the job markets so that they can respond to the economic and social consequences of the ageing of the population

In the macroeconomic scenario agreed upon until 2050, Spain is the country in the European Union in which the activity rate will increase the most in the period 2004 – 2050, with the exception of Cyprus. This is due to the important increase in the Activity of females and older workers (55-64 years). It is also the country in the EU15 in which the unemployment rate will drop the most during the period for which the forecast has been made (-3.4 p.p. compared to 2005). Despite the fact that the number of workers employed would increase by 23 % between 2003 and 2025, it would then drop by 22 % in the period between 2025-2050 (the largest drop in the EU15 in this second period), meaning that the total variation is -3.8 % during the whole period.

One of the most significant results is the deceleration in potential growth due to the ageing effect. Thus, during the period for which the forecast has been done, the potential growth rate is divided by two in EU25, dropping from 2.4 % to 1.2 %. In the case of Spain, due to the higher drop in the contribution from employment projected at the end of the period, this deceleration could be more acute.

In order to meet the expected increase in expenditure associated to ageing, the strategy of the job markets in Spain will be based on the following:

- Increasing employment, extending the working life and increasing productivity. Prolonging the working life and increasing employment rates among older workers and women, which

will also allow to improve the sufficiency of the pensions by increasing the accumulation of pension rights.

- Measures aimed at providing incentives for prolonging active life (see commitment 4)
- Reducing social security schemes to two system: one for workers employed by third parties and the other for self-employed workers.
- Introducing elements of contribution in the permanent disability pension.
- Recovering the replacement income classification for widowhood pensions and extending their scope to civil partnerships.

This means compliance with the terms of Act 39/2006, of 14th December, on the Promotion of Personal Autonomy and Care for Dependent Persons, on the necessary regulation of “private instruments for covering dependency” and, in order to facilitate co-funding of the services established in the Act on a joint funding basis, the regulation of the fiscal treatment dispensed to providing instruments for covering dependency.

On the other hand, Act 35/2006, of 28th November, on the Income Tax applicable to Natural Persons and the partial amendment of the Laws on Corporate Tax, Non-Resident Income and Inheritance Taxes introduces a series of measures to promote coverage for dependency in fiscal terms by means of private insurance and pension plans, altering the substantive regulation of the latter.

Thus, for taxpayers with annual income from work equal to or lower than 9,000 €, the reduction is 8,000 € per annum. If net income is between 9,000.01 and 13,000 €, the reduction is the result of increasing by 100 %, 4,000 € minus the result of multiplying by 0.35 the difference between the income from work and 9,000 €. Finally, if the income is over 13,000 € or if the person has income, including exempt income, other than from work in excess of 6,500 €, the reduction is 5,200 €.

In addition, in the event of disability, these reductions are increased by 3,200 € per annum. This reduction will be 7,100 € for disabled persons that provide proof of the assistance of third parties or reduced mobility or a degree of disability that is equal to or higher than 65 %.

Encouraging older workers to participate in the labour market and promoting a shift in the descending tendency of the effective age of retirement, with the aim of meeting the European Council of Stockholm challenge consisting in rising the age of retirement in five years for 2010, have been special objectives during these years.

Concerning new generated pensions in 2006, the effective age of retirement is to be placed at 63,5 a figure above the European average and confirms the above-mentioned shift in tendency.

The recent agreement on Social Security Measures gathers a series of additional measures directed to encourage the elongation of voluntary labour life. All those measures fulfil the general focus on the passage from the labour life to retirement, with an aim to make more flexible and gradual the modalities of retirement in order for older persons to keep on working as long as possible, along with encouraging the access to pensions over 65 years of age. All that without prejudice to possible reductions of age related to arduous, dangerous or toxic activities.

COMMITMENT 6: To promote ongoing education and adapt the educational system so that it is adjusted to the changing economic, social and demographic conditions

Spain has prior experience in education of the older persons, which is a good basis on which to develop future initiatives.

Traditionally, the education of the older persons has been supported at political and social levels by means of the participation of public Institutions, associations of older persons and trade unions at national, Autonomous Community and local levels.

Organic Law 2/2006 on Education (LOE) considers education to be ongoing learning that takes place throughout life. *Consequently, all citizens should have the opportunity to obtain training both inside and outside the educational system.*

The LOE dedicates its Title I, chapter IX to Education for Adults. Its fundamental aims, which are specified below, allow to incorporate and improve the initiatives associated to educational development for the older persons:

- To acquire basic training, to extend and renew their knowledge, skills and abilities on a permanent basis and facilitate access to the various levels in the educational system.
- To improve their professional training or acquire training in order to exercise other professions.
- To develop their personal skills in the areas of expression, communication, interpersonal relations and knowledge-building.
- To develop their ability to participate in social, cultural, political and economic life and make effective their entitlement to democratic citizenship.
- To develop programmes that correct the risks of social exclusion, especially of the most disadvantaged sectors.
- To provide an adequate response to the challenges posed by the progressive ageing of the population, ensuring that older persons have the opportunity to increase and update their skills.
- To foresee and peacefully solve personal, family and social conflicts, promote effective equality of rights and opportunities between men and women and analyse and perform critical evaluation of the inequalities existing between them.

In the scope of ongoing education, two types of teaching, formal and informal, are contemplated:

Integrating older persons in every educational, training and labour realms, or even better, not excluding them, is a matter included equally in the LOE whose main objective consists in promoting active citizenship, equality of opportunities for every sector of the population and a bigger social cohesion:

Article 5 of the law points as a basic principle to promote, throughout our educational system, the permanent education and promote that adults join different tuition programs as well as enhancing learning with other responsibilities and activities. Therefore, public administrations should promote flexible learning possibilities enabling the acquisition of basic skills and, when possible, the corresponding diploma to those adults who have left the learning system without reaching any graduation.

Adult Education has as an end to offer the possibility to every older person to acquire, complete and broaden his or her knowledge and aptitudes for his/her personal and professional development.

To fulfil the above mentioned subject, educational administrations will be able to cooperate with public administrations with competences for adult education and, especially, with the administration competent in labour matters, local authorities and social partners.

Concerning concrete actions, it is to be mentioned the following aids and allocations on an annual basis.

- Aids to local authorities in the management realm of the Ministry of Education, to fulfil activities in the framework of adult education.
- Subsidies to private non-profit organizations in the realm of Ministry of Education to fulfil activities in the framework of adult education all the life long.
- Subsidies directed to Foundations organically dependent to political parties with representation in the *Cortes Generales* to develop training activities within the subject of education for older persons.
- Subsidies to host congresses, meetings and other similar activities to private non- profit organizations to diffuse activities for the education of older persons in the framework of long-life learning.
- Miguel Hernández Awards, created in 1991 for the acknowledgment of the importance of removing education inequalities and removing the discrimination faced by those groups in basic training. In this respect, the effect produced in groups of adults is the integration and motivation concrete projects, gratifying and with immediate results. The fist Miguel Hernández Award is presented on an annual basis to the Spanish official candidature to the International Literacy Awards called for by the UNESCO.

Formal education is planned, structured and regulated. It is divided in levels that ensure the unity of the educational process and facilitate the continuity of same throughout people's lives.

There are currently several possibilities that guarantee the access of the older persons to formal teaching at all levels, from primary and secondary to university studies.

At national level, in the scope of the Ministry of Education and Science (MEC), formal teaching for adults includes the following:

- preparation for examinations to access the various levels: secondary education, vocational training cycles and university
- basic education at three levels: I) literacy, II) knowledge consolidation and III) secondary education
- vocational teaching: vocational training cycles and vocational workshops

The Education Administrations, in collaboration with the local and Autonomous Community Public Administrations, organise guidance and information services on the various education options in each territorial area and the possibilities for gaining access to same.

Access to these education options may be gained by both presence-based and distance learning.

The Ministry of Education and Science (MEC) has promoted the distance option via the Centre for Innovation and Development of Distance Education (CIDEAD), the functions of which include to provide easier access to education to adults, especially to those that cannot continue attendance-based studies due to various circumstances.

In this regard, the number of older persons participating in formal educational distance courses is on the increase, as may be seen from the data included in the following graph (drawn up on the basis of

the latest figures published by the MEC) in the year 2004-2005. 41 % of the students included in this arrangement were over the age of 40 and 14% of the latter group were aged over 64 years.

Percentage of adult students, distributed according to age, that have participated in Formal Education under distance learning arrangements

16-14 years
25-39 years
40-64 years
Over 64 years

Source: Figures of education in Spain. Statistics and indicators. 2005 and 2006 Editions. Spanish Ministry of Education and Science (MEC) Statistics Office.

Informal education consists of training activities that provide for personal development with a view of active participation by adults in the social, cultural and political activities of their surroundings.

This training is organised at public and private levels and includes the collaboration of various different Institutions at national, Autonomous Community or local levels: centres for adults, popular universities, associations of older persons, trade unions, local corporations, universities...

The training offering is highly varied, according to the personal and social needs and interests of the corresponding environment. Some of the activities that are carried out in this area as regards the older persons are as follows:

University for the Elderly (PUM) programmes, carried out in Spanish universities outside the limits of format education. These programmes are aimed at older persons with an average age of between 55 and 70 years that are physically and mentally fit. The objective of these programmes is to strengthen their educational and cultural development. They are organised around five areas of knowledge: humanities and social sciences, legal and economic sciences, earth and environmental sciences, bio sanitary sciences and technological sciences. The average duration is between 3 and 5 years.

The University for the Elderly (PUM) programmes are promoted by the State Association of University Programmes for the Elderly, the purpose of which is to promote and structure university education programmes and stimulate dialogue between universities, public administrations and private entities.

23,000 people took part in these programmes in the year 2006.

Mentor Classes, an open, distance learning, Internet-based educational system, promoted by the Educational Information and Communication Centre in the Ministry of Education and Science, in collaboration with a wide number of Institutions (Ministries, Education Departments in Autonomous Communities, Educational Centres, City Councils and NGOs)

These classes are to be found especially in adult centres in rural areas or run by City Councils.

There are 350 classes in operation, with more than 100 courses and tutorial assistance.

The training offering includes subjects like the following: introduction to Information Technology, office IT programmes, Internet, English, Environmental Issues, General Culture or Health and Education.

On the other hand, the Spanish Institute of Older Persons and Social Services (IMSERSO), as the body that is competent in the area of the older persons, as part of its Specialised Training in Social Services programme, has promoted, organised and coordinated informal training activities, including most importantly University for the Elderly programmes in collaboration with universities and training initiatives to promote intergenerational education.

COMMITMENT 7: To make an effort to guarantee quality of life at all ages and maintain an independent life that includes health and wellbeing.

The Spanish State, via the IMSERSO, is carrying out the following programmes as part of its line of activities on Active Ageing:

State Reference Centres

These are resources with a multidisciplinary approach that are specialised in research, analysis, assessment and knowledge of the best forms of socio-sanitary care that will also serve as forums where all of the bodies and entities that provide services to various sectors of the older persons and/or dependent population and their families that care for them, as well as to the healthcare sector in particular. In accordance with these objectives, projects of State Reference Centres have been drawn up for the following: people with Alzheimer or other dementias, people with Parkinson's disease, people with mental health problems and people affected by brain damage in adulthood. In all of these centres, one of the main driving forces is to **eliminate inequalities for reasons of gender** by creating within their Structure a specific Unit to act as an advisory body to the management and to monitor that in all of the activities and programmes that are carried out, the principle of mainstreaming is applied in the terms defined by the United Nations, the European Union and the Council of Europe.

Social Thermalism

The Social Thermalism Programme is currently one of the IMSERSO projects that are most widely extended among the older persons sector of the population. The basic objective of this Programme is to offer older people the possibility to visit thermal baths at reduced prices at the spa resorts with which contracts have been entered into, thus improving their quality of life and contributing to active ageing through the adoption of a healthy lifestyle.

The programme started in 1990 with 31,315 vacancies and the participation of 31 spa resorts. In the year 2007, 82 spa resorts will participate and there will be a total of 200,000 vacancies. In 2008, the number of vacancies is scheduled to increase to 250,000. The programme is funded by means of affordable co-funding by the user.

Holidays

The Programme of Holidays for Older Persons and Maintaining Employment in Tourist Areas allows the older persons sector of the population the possibility of enjoying holidays in areas with a warm climate, cultural circuits in places and on routes that are Interesting from the tourism perspective, as well as recreational and contemplative activities in nature tourism. The Programme was implemented in the 1985/1986 season, with 16,000 vacancies. Since then, it has developed without interruption, steadily growing and expanding both in terms of the destinations and the companies participating in same, with a high satisfaction rate that currently stands at 96.3 %. In the 2006-2007 season, 830,000 vacancies were offered and the intention is for the number to be increased to 1,000,000 vacancies next season. The Programme is funded by the participation of the

Administration and the users in an average proportion of 30 % to 70 % of the total cost of each vacancy, respectively.

Accessibility

There are basic state regulations on accessibility. In turn, the Autonomous Communities have laid down provisions in this area that are applicable in their territorial areas. Moreover, the Ministry of Labour and Social Affairs has an Accessibility Programme in the spheres of building and urban planning, transport and communication, working in collaboration with other Institutions that are interested in carrying out this kind of projects.

Remote Assistance

The Remote Home Assistance Service is provided by a telephone line located in the users' homes, which allows the older persons to speak from any part of their homes, 24 hours a day, with a centre staffed by professionals that are trained to give an adequate response to the needs that arise, either by themselves or by mobilising other human and material resources, belonging to the user or existing in the community. The community is run at State level and carried out by means of an agreement between the IMSERSO, the Spanish Federation of Municipalities and Provinces (FEMP) and the Local Corporations. In the year 2002, 45,353 users were being catered for in this programme. This figure is expected to rise to 176,278 in the year 2007.

Subsidies

The State programme of General Scheme Subsidies is intended to facilitate active ageing and to strengthen the associations of older persons. These grants are awarded to NGOs that operate at state level on a non-profit basis and are regulated by a Ministerial Order from the Ministry of Labour and Social Affairs. The programme that is being funded is one for maintenance, operation and the usual activities of major confederations, federations and associations of older persons. In the year 2002, 32 grants of this type were granted and in the year 2006, 38 subsidies were granted. In 2007, the ministerial order and the corresponding decision were published, but the call for applications that was mentioned has not been issued yet.

Expenditure in Healthcare

(See Commitment 3)

Training of Professionals

Following guidelines issued by the European Union, the quality of life of groups with social needs and the leveraging of the resources of the Social Services that fall under the jurisdiction of the State largely depend on the training of the professionals that are going to provide these resources now or in the future. The Specialised Training in Social Services developed by the IMSERSO improves the quality of management, matches the supply to the actual needs of the sectors involved, contributes to developing social welfare and provides incentives for initiative and social participation.

One of the priorities of the IMSERSO is to promote Training in Social Services, by configuring an Annual Plan on Specialised Training that can offer society an efficient instrument to improve the quality of the services that are provided to the older persons and the dependent persons by means of training, information, refresher courses and complementary specialisation of the professionals that meet their needs and demands in various planes and perspectives.

The Specialised Training Plan is aimed at the following:

- Professionals, planners and those in charge of managing, designing and implementing social programmes and services related to the older persons and the dependent persons.
- University degree graduates, diploma graduates and students in the latter years of their degrees.
- Training personnel in areas for which there is a high demand as regards social services.

With a view to providing specialised training at university level as regards knowledge of ageing, we shall provide a list of the various training activities carried out in 2007 to serve as an example:

TRAINING INITIATIVE	PARTICIPANT ENTITY/ ENTITIES
Master in Alzheimer's Disease	IMSERSO - UNIVERSITY OF SALAMANCA
Course on Expert in Family and Dependency.	IMSERSO – PONTIFICAL UNIVERSITY OF SALAMANCA
IV Higher Level Training Plan in Social Services.	IMSERSO – OFFICIAL ASSOCIATION OF PSYCHOLOGISTS IN MADRID
Open Course on Technologies for Personal Autonomy.	IMSERSO – INSTITUTE OF BIOMECHANICS IN VALENCIA
Spa resorts. 2 nd edition of training courses on quality of services.	IMSERSO - INGESS
Initiatives to be carried out in collaboration with the General Council of Associations of Social Workers.	IMSERSO – OFFICIAL COUNCIL OF SOCIAL WORKERS IN MADRID
Ongoing Training in the European strategy: analysis and assessment of university courses for the older persons in Spain and in Europe.	IMSERSO, UNIVERSITY OF ALICANTE AND THE STATE ASSOCIATION OF OLDER PERSONS
Conferences: Practical update of assessment and prevention of Abuse of the Dependent.	IMSERSO
Socio-sanitary cooperation conferences on psychosocial care for people with serious mental disorders.	IMSERSO
New models of homes for the older persons: areas for co-existence and assessment of everyday life.	IMSERSO
Home help and dependency services	IMSERSO
Conferences to heighten awareness in the area of accessible transport on urban bus lines.	IMSERSO IN COLLABORATION WITH THE SPANISH FEDERATION OF MUNICIPALITIES AND PROVINCES (FEMP)
Municipal accessibility course.	IMSERSO IN COLLABORATION WITH THE FOUNDATION OF THE SPANISH NATIONAL ORGANISATION FOR THE BLIND (ONCE)
Conference to disseminate the Remote Mobile Assistance programme for the victims of gender-based violence.	IMSERSO – GOVERNMENT DELEGATION TO COMBAT VIOLENCE AGAINST WOMEN
Local management of the Remote Mobile Assistance programme for the victims of gender-based violence.	IMSERSO - FEMP, SPANISH RED CROSS AND EULEN SOCIO-SANITARY SERVICES

COMMITMENT 8: To integrate a gender approach in a society that is ageing in order to support families that provide care for their older persons and to promote intergenerational and intragenerational solidarity among members.

On this subject, the legislation that has been drawn up stands out for its relevance as regards the direct impact on the lives of women:

Organic Law for Effective Equality between Women and Men (Official Spanish State Gazette, B.O.E. no. 71 of 23/03/2007)

The aim of this Act is to combat all manifestations of direct or indirect discrimination for reasons of sex and to promote real equality between men and women, by means of specific measures, on the basis of the principle of mainstreaming, which affect education, culture, healthcare, measures to promote equality in the media and the right to employment with equal opportunities, among others.

Act for the Promotion of Personal Autonomy and Care for Dependent Persons. Promoted by the IMSERSO.

This Act will allow women that look after dependent family members (majority formula in Spain, with the aggravating factor that they are often older persons themselves), on the one hand, financial remuneration and inclusion on the Social Security system and on the other hand, free time for personal development.

Public Administrations Order to Promote Conciliation between Personal and Work Life APU/3902/2005 (Official Spanish State Gazette, B.O.E. 16/12/2005).

These Regulations have generated the “Plan Concilia” (Conciliate Plan) which will free many grandmothers of the responsibility of caring for their grandchildren, giving them free time for personal development.

Organic Law 1/2004, of 28th December, on Comprehensive Protection Measures Against Gender-Based Violence.

The intention of this Act is to provide a global response to violence against women. The scope of this Act includes preventative, educational, social and welfare aspects and subsequent care for victims, civil regulations with an impact in the family sphere and a whole series of legal measures to ensure that situations of gender-based violence, among others, are adequately dealt with.

Act 42/2003, of 21st November, on the Amendment of the Civil Code and the Code of Civil Procedure in the Area of Family Relations between Grandchildren and Grandparents

Grandparents play a fundamental role in family cohesion and in the transmission of values. This Act intends to singularise the regime of relations between grandparents and grandchildren, both in the case of family break-ups and in the case of simple abandonment of obligations by parents. In the second place, the grandparents are assigned a relevant function if parents fail to comply with the obligations derived from their parental authority.

Act 30/2003, of 13th October, on measures for incorporating the assessment of the gender impact of regulatory provisions drawn up by the Government

As well as the Ministry of Labour and Social Affairs, the Ministry of Science and Technology, the Ministry of Education and Science, the Ministry of Development, the Ministry of Economy and

Treasury, the Ministry of Inland Affairs and the Ministry of Justice, bodies such as the Spanish Women's Institute, the Secretariat of Equality Policies, the Observatory on Women's Health, the Spanish Federation of Municipalities and Provinces and the IMSERSO, a Body that always takes the gender perspective into account, also have competences.

Gerontology chairs have been created in various Universities that address the issues of older women. For example, the R+D+i initiative "Women, Globalisation and Human Rights" by the Spanish Women's Institute.

The Autonomous Communities, via the Directorate-Generals of Women's Affairs, City Councils and Departments, carry out projects that involve training, healthcare, leisure, culture and specific projects for rural environments.

For example, the following should be highlighted:

- "Project on Corporate Awareness of Equality", Alcobendas City Council.
- The "Tiempo Propio" (Our Own Time) programme in the Principality of Asturias, implemented in the rural environment and particularly in the mining basin.
- Private initiatives such as the "Obra Social" (Social Work) projects run by some Banks, Caja Madrid, La Caixa, etc. include programmes that take the gender perspective into account.

All of these Institutions have organised very varied courses covering issues of interest such as: Self-esteem, Women in History, Social Skills, Improving Social Networks, Healthy Ageing, Promoting the Creation of Associations and Voluntary Work, etc.... They also fund research projects in areas that benefit Equality between older women and men: Women, globalisation and Human Rights; social exclusion issues and the problems of widowed women. On the other hand, women's conferences are also organised and their conclusions are transferred to the State Council on the Elderly

COMMITMENT 9: To support the families that provide care for the older persons and promote intergenerational and intragenerational solidarity among members

The quality of contact and interrelation between young and older adults tells a lot about the quality of our lives.

In this regard, Act 35/2006 includes the exempt income listed in article 7 "Public financial benefits associated to the service, for care in the family setting and personalised care derived from the Act on the Promotion of Personal Autonomy and Care for Dependent Persons."

On the other hand, this Act increased for the taxpayer the minimum per ascendant to 900 € per annum. If the ascendant is over the age of 75 years, the minimum rises to 1,100 €.

In the event of disability, these minimums are increased by 2,270 € or 6,900 € if the degree of disability is equal to or over 65 %.

The minimum deduction for ascendants constitutes part of the liquidatable base that is not subject to income tax as it is intended to meet the basic personal and family needs of the taxpayer, thus facilitating care of the older persons.

Intergenerational programmes are vehicles for specific, ongoing exchange of resources and learning between the older and the younger generations, for individual and social benefits. According to the International Consortium of Intergenerational Programmes, (www.icip.info) an intergenerational

programme is a means of encouraging the specific, ongoing exchange of resources and learning between the older and younger generations with the ultimate aim of obtaining individual and social benefits. In general, they consist of an organised series of activities that are carried out by older and younger people. One simple example of an intergenerational programme is a group of schoolchildren that regularly visits a home for older persons for the purposes of offering company, dialogue and support to the residents in the home.

The intergenerational concept is not new and is historically linked to family and patriarchal relations in various cultures. It is also in line with the UN slogan “towards a society for all ages”.

Since the month of September last, the network of intergenerational programmes that are coordinated by the IMSERSO and the board of management of the International Consortium for Intergenerational Programmes has been in operation. The purpose of this initiative is initially the exchange of information, documentation, events and any other issues of interest to the members that make it up, all of whom are involved in intergenerational programmes. The Network considers that programmes that are well designed and defined in all aspects and dimensions can be highly beneficial to all involved. So far, forms have been sent out to be filled in by all of those that participate on an intergenerational programme. An interesting document published by the UNESCO and the Beth Johnson Foundation on the situation of intergenerational programmes in various countries has also been disseminated.

redintergeneracional@mtas.es

On the other hand, at the initiative of the IMSERSO, the Plan for training managers of intergenerational programmes has been set up. This is a pioneering plan in our country and the intention is to provide eight 60-hour long courses in seven different Autonomous Communities, to a total of 160 students.

The “Portal de Mayores” (Older Persons’ Portal) www.imsersomayores.csic.es will assess the convenience of including this intergenerational programme in its database depending on the interest that it may entail for professionals in this sector.

The GYRO Project seeks to improve the generativity and social relevance of the older persons by involving them in volunteers in significant care for other groups. This is a project that is in its third year of operation and which has been supported by the “Obra Social” (Social Work) initiative of Caja de Madrid.

As regards Non-Governmental Organisations, we should mention OFECUM (Cultural Offering by Elderly University Students), an NGO based in Granada, which has introduced an intergenerational perspective in its operating methodology.

OFECUM Association ofecum@ugr.es

COMMITMENT 10: To promote the application and follow-up on the Regional Implementation Strategy by means of regional cooperation.

Organisation in April 2002 of the Second World Assembly on Ageing in Madrid:

- Following the organisation of the Second World Assembly on Ageing, the IMSERSO has attended all of the annual sessions of the *UN Commission for Social Development*. Follow-up on the Second Assembly and the activities linked to the application, follow-up, examination and assessment of the priorities established in the Madrid International Plan of Action on Ageing (MIPAA) which was approved at the Second World Assembly are among the objectives of the International Area of the IMSERSO.

Spain's Contribution to the process of follow-up on the Madrid International Plan of Action on Ageing:

- ***Annual International Technical Meetings***

Since the United Nations' Second World Assembly on Ageing was held in Madrid, the IMSERSO has organised international seminars to debate and examine the recommendations made at the Second Assembly, with a view to proposing specific initiatives regarding policies for the older persons. Since 2003, these international seminars have been held on an annual basis. The organisation of these seminars or technical meetings follows from the commitment undertaken by Spain with the UN Commission for Social Development, on contributing to the application and follow-up of the MIPAA.

- ***Meeting of Focal Points*** on ageing from the Member States of the United Nations Economic Commission for Europe (UNECE) held in Segovia and organised by the IMSERSO between 13th and 15th November 2006, to prepare to update and assess the Madrid Plan of Action and the Berlin Regional Implementation Strategy.

Updating and assessment of the Madrid International Plan and the Berlin Strategy:

Five years after the Second Assembly and the Ministerial Conference in Berlin, the UNECE is going to proceed to update the MIPAA and the RIS. The IMSERSO will participate in this process as follows:

- ***Year 2007. The IMSERSO will host the European Regional Conference of the UNECE on Ageing, which will take place in Leon between 6th and 8th November 2007 and which will include an update of the Madrid Plan and the Berlin Strategy in the scope of the region of Europe. A Civil Society Forum is scheduled for 5th November.***
- ***Year 2008. The organisation of the International EURAG Congress (European Federation of Associations of Older Persons), which will be co-funded by the IMSERSO, will serve as a platform for Non-Governmental Organisations to make their contributions to the process of updating the Madrid Plan and the Berlin Strategy.***

GENERAL RECOMMENDATIONS.

From our perspective and in conclusion, the following recommendations should be taken into account:

- To continue to incorporate cross disciplinary lines of action spanning all of the spheres that affect the older persons and their families at three prevention levels, caring, training, awareness raising initiatives and research and innovation.
- To have a Body or Unit for follow-up and assessment of Ageing that should include the participation of the Administration, the civil society and the academic world and ensure independent assessment and the proposal of measures to integrate the three entities involved.
- To design and generalise the application of methods and instruments in order to follow up on and assess the MIPAA and the RIS, as well as the other national or international Plans in the context of ageing that will also allow for the following:
 - To measure the degree of its social impact.
 - To design protocols for action and records for gathering data and common approved work instruments for the various Autonomous Communities that guarantee quality care and a similar extent of coverage for the entire State territory.
- Therefore, there is a need for indicators, procedures for revision, assessment and improvement, the establishment of a calendar and a financial framework in order to explore the various applications of the MIPAA and the RIS in the region of the UNECE. The organisations that represent the interested parties should be consulted and they should also take part in this procedure.
- To articulate agile, efficient coordination between the sectors that are involved in providing care for these people, especially the healthcare, educational and social services. In this regard, it would be very appropriate to promote work in local networks that complement each other and promote quality of life for the older persons and their families.
- To guarantee, by means of specialised interdisciplinary and integrated services, information, training and expert follow-up on the older persons and their families and their participation in decision-making on key issues of their everyday lives.
- To promote the exchange of experiences, innovations and best practices among the Member States of the UNECE and within Spain, among the Autonomous Communities, in accordance with the *Open Coordination Method* of the European Union.
- To generalise in the context of the Administrations the *bottom-up participatory model*², which gives priority to participation by associations that represent the older persons and their families in decision-making on issues that affect them.
- To reinforce the access of the older persons to the information society, by facilitating training on new technologies.

² According to the criterion followed by the United Nations for the application of its Plans and Programmes aimed at social groups. This approach is called the “Bottom-up Approach” or the participatory approach in the standard terminology.

General information

The Spanish Report was drawn up by the Spanish Institute of Older Persons and Social Services (IMSERSO), which belongs to the State Secretariat of Social Services, Families and the Disabled in the Ministry of Labour and Social Affairs, with the collaboration of the following units:

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