

**UNITED NATIONS
ECONOMIC COMMISSION FOR EUROPE**

WORKING GROUP ON AGEING

Second meeting
Geneva, 23–24 November 2009
Item 4b of the provisional agenda

MAINSTREAMING AGEING: INDICATORS TO MONITOR IMPLEMENTATION

2009 WORK ACTIVITY REPORT

Summary

This document prepared by the European Centre for Social Welfare Policy and Research (ECV) outlines the activities in monitoring implementation of the UNECE Regional Strategy for the Madrid International Plan of Action on Ageing (MIPAA/RIS) undertaken according to the Working Group's programme of work (ECE/WG.1/2008/3, paras 11 to 15). The report reflects work done on indicators and website development as well as selected publications and events organized. The report contains a provisional list of gender specific indicators and a list of long-term care indicators as well as notes on methodology and sources. Its annex provides graphs of gender indicators.



MAINSTREAMING AGEING: INDICATORS TO MONITOR IMPLEMENTATION
(MA:IMI)
2009 Work Activity Report

European Centre for Social Welfare Policy and Research
Vienna
November 2009

This document outlines the activities of the European Centre for Social Welfare Policy and Research Vienna undertaken within the framework of the 2nd phase of the project Mainstreaming Ageing: Indicators to Monitor Implementation (MA:IMI) in 2009. The main areas of work are presented in the report and they include our work on indicators, website developments as well as selected publications and events organised by the European Centre. A provisional list of the gender specific indicators as well as the list containing the long-term care indicators are presented in the first part of the document together with some notes on methodology and sources. A number of selected gender indicators are visualised in the graph appendix.



WORK ON INDICATORS

In 2009, our work on indicators has focused on:

- Further updating of existing mainstreaming ageing indicators (i.e. gathering new/missing data for specific ageing-related indicators); and
- Developing, and gathering information, on two additional sets of indicators: gender specific mainstreaming ageing indicators and long-term care indicators.

1. UNECE and European Centre Data Collection on Existing Indicators

In 2009, the Population Ageing Unit of the UNECE together with the European Centre sent out a data request to all Focal Points on Ageing in the UNECE region. The aim of this exercise has been to update existing statistics and fill in the missing data in the European Centre's MA:IMI database with the help of UNECE's National Focal Points on Ageing. The European Centre's MA:IMI team has been responsible for compiling the templates for each UNECE Member State and for providing help and information on various methodological and technical issues.

The European Centre has so far received new/updated data and comments from 20 member states. These results are being incorporated into our database and will be disseminated on the website.

2. Gender Specific Indicators

One of the main tasks to be undertaken in the 2nd phase of the European Centre's MA:IMI project is to design and develop indicators and collect corresponding data on gender specific indicators on "mainstreaming ageing". The work during 2009 has resulted in a provisional list of indicators (the indicators highlighted in the tables can be found in a visualised format in the graph appendix). Data have been collected on these indicators and have also been graphically illustrated. The list of gender specific indicators - presented below - should be viewed as a first proposal.

In collecting these indicators, we have so far utilized as much as possible existing international sources, such as the databases of the UN, UNECE, Eurostat, OCED as well as European Commission reports. Our work during 2009 has confirmed that information particularly on pensions and financial security in old age in a gender context is available only for a limited number of UNECE countries from international sources, which highlights the importance of using national sources in gathering these data. Regarding country coverage of data on reconciliation of work and family life and child care, comparative data on these indicators is lacking for many South Eastern European and CIS countries. Comparability issues also arise from the different poverty measures used in different countries (we have calculated poverty rates using EU-SILC, which currently covers 22 EU Member States plus Iceland and Norway).

Demographic context

- Gender gaps in longevity and life expectancy
- Changing individual and family patterns

Group		Definition	Source	Notes
DEM	Longevity	Life expectancy at birth and at age 60 and 65 and the gender gap	<i>UNECE Gender Statistics Database, UN World Population Prospects</i>	2006
		Life expectancy gains, by gender	<i>UN World Population Prospects</i>	1950-2005 (gains in number of years and days)
	Fertility	Timing of fertility (% of women having a first live birth by age 25)	<i>UNECE Family and Fertility Surveys (FFS)</i>	Different birth cohorts from late 1940s onwards to mid 1990s
	Demographic Events	The postponement of first marriage and motherhood	<i>UNECE Family and Fertility Surveys (FFS)</i>	1980-2001
		Expected ultimate family size	<i>UNECE Family and Fertility Surveys (FFS)</i>	Women aged 20-24 with no children
		Important demographic events that happened to women by age 25 ¹	<i>UNECE Family and Fertility Surveys (FFS)</i>	Different birth cohorts
	Changing family patterns	Extramarital births (number of births outside marriage as a % of total live births)	<i>Eurostat</i>	1960 and 2007
		Number of divorces (per 100 inhabitants / per 100 marriages in the given year)	<i>Eurostat</i>	1960 and 2007, 1960-2005
		Number of lone parent families as a % of families with dependent children	<i>Whiteford ()</i>	1980-2005

Labour Market

- Gendered labour market participation
- Combining work, family life, and child care

LM	Educational attainment	Tertiary educational graduates (women per 100 men)	<i>Eurostat</i>	2000 and 2006
		Employment to population ratio, by gender	<i>Eurostat, LFS</i>	2008

¹ Important demographic events: Percentage of women who have completed their current highest level of education; have left the parental home; have entered the labour market; have entered a co-resident union; have become mothers by age 25.

Participation	Gender employment gap ²	<i>Eurostat, LFS; UNECE Gender Statistics Database</i>	2008	
	Gender unemployment gap ³	<i>Eurostat, LFS; UNECE Gender Statistics Database</i>	2008	
	Long-term unemployment, by gender	<i>Eurostat, LFS</i>	2006, (women aged 15+)	
	Part-time employment, by gender (voluntary/involuntary)	<i>Eurostat, LFS</i>	2006	
	Temporary employment, by gender	<i>Eurostat, LFS</i>	2006	
	Average usual weekly working hours of employed persons, by gender (full-time and part-time)	<i>Eurostat, LFS</i>	2005	
	Persons employed in private vs. public sector, by gender	<i>UNECE Gender Statistics Database</i>	1990-2001	
	Employment by sector of activity, by gender	<i>UNECE Gender Statistics Database</i>	1990-2006	
	Gender gap in socio-economic power	<i>Eurostat, LFS; UNECE Gender Statistics Database</i>	2006 (Share of women among legislators, senior officials and managers – ISCO 1)	
	Time use of employed persons, by activity and by gender (hours per day)	<i>UNECE Gender Statistics Database</i>	Various years	
	Average number of working years, by gender	<i>Eurostat, LFS, Ad-hoc modules</i>	2006	
	Earnings	Gender pay gap ⁴	<i>Eurostat, National sources</i>	2006
		Earnings difference between women and men by age, occupation, length of service	<i>Eurostat, Structure of Earnings Survey</i>	2002, 2006
Reconciliation of work and family life	Labour force status after childbirth	<i>Whiteford, ()</i>		
	Employment rate of women by number of children and by age of youngest child	<i>Eurostat, LFS, Ad.hoc modules</i>	2005 (Women aged 25-49)	
	Employment gap of women with children		2007, (women with two children / women with a child below age 6)	

		Employed women/men who wish to change the organisation of their working life and care responsibilities	<i>Eurostat, LFS, Ad-hoc modules</i>	2005 (Persons aged 20-49)
		Employed women/men who can vary start/end of working day for family reasons	<i>Eurostat, LFS, Ad-hoc modules</i>	2005 (Persons aged 20-49)
		Employed women/men who can take whole days off for family reasons	<i>Eurostat, LFS, Ad-hoc modules</i>	2005 (Persons aged 20-49)
		Employed women/men taking time off over the last 12 months for family sickness and emergencies	<i>Eurostat, LFS, Ad-hoc modules</i>	2005 (Persons aged 20-49)
		Remuneration of special leave days	<i>Eurostat, LFS, Ad-hoc modules</i>	2005
	Parental leave and benefit payment	Length of parental leave (paid / unpaid)	<i>International Review of Leave Policies, 2008</i>	2008
		Parental benefit in % of AW ⁵ (net benefit as a % of net earning)	<i>International Review of Leave Policies, 2008</i>	2008
		Paternity leave (length and benefit)	<i>International Review of Leave Policies, 2008</i>	2008
		Paternal benefit (individual / family right)	<i>International Review of Leave Policies, 2008, MISSOC Database, 2008</i>	2008
		Parental leave flexibility	<i>International Review of Leave Policies, 2008, MISSOC Database, 2008</i>	2008
	Childcare	Main type of childcare used	<i>Eurostat, EU-SILC 2006</i>	2005
		Children in formal childcare by age and duration	<i>Eurostat, EU-SILC 2006</i>	2005
		Children cared only by their parents	<i>Eurostat, EU-SILC 2006</i>	2005
	Gender roles	Perceptions and attitudes	<i>European Social Survey, round 2, (2004), Population Policy Acceptance Surveys</i>	2004, 2000-2003

² Measured by the difference in employment rates between women and men in percentage points.

³ Measured by the difference in unemployment rates between women and men in percentage points.

⁴ Measured by the ratio of women's gross hourly earnings to men's for paid employees at work at least 15 hours.

⁵ Average worker (average wage of a full-time worker in industries and services – NACE C-K)

Pensions

-From work to retirement, p

-Pensions, and old-age income security, risks, poverty

Transition from work to retirement	Average exit age from the labour force and legal/early retirement age, by gender	<i>Eurostat, LFS, MISSOC, ISSA</i>	2006-2009
	Actual retirement and seniority	<i>SPC Report (2009)</i>	2009
	Main reasons for retirement, by gender	<i>Eurostat, LFS, Ad-hoc module</i>	2006
	Early/late retirement, by gender ⁶	<i>National Administrative Sources</i>	2005, 2006
	Average service time of new old age pensioners	<i>National Administrative Sources</i>	1996-2006
Pensions	Net theoretical pension replacement rates for women, by number of years out of labour market due to childcare	<i>SPC Report (2009)</i>	2009
	Percentage of pensioners receiving occupational pensions, by gender	<i>Whiteford ()</i>	
Poverty	At risk of poverty rates, by gender, age, household type	<i>Eurostat, EU-SILC</i>	2003-2006
	Gender gap ⁷ , by age groups	<i>Eurostat, EU-SILC</i>	2003-2006

3. Long Term Care Indicators

Establishing a set of long-term care indicators has been selected by Member Countries as a second thematic focus for the 2nd phase of the European Centre's MA:IMI project. Based on the work on a preliminary list of indicators under the first project phase of MA:IMI, work in 2009 focused on data collection and further methodological and analytical work. This involved extensive work with national sources and comparisons and reconciliation of/with international data sets (Eurostat; OECD; UN), as care indicators are still in its infancy in international data collections. Moreover, as our work during 2009 has confirmed, serious quality issues remain in all European or international data collections in this field.

⁶ Percentage of new old age pensioners retiring before and at/after the statutory retirement age.

⁷ Measured by the proportion of (single) women (working age – 14 /17-64; elderly – 65+) under the low income threshold set at 60% of the median net annual equivalised income, using the OECD modified equivalence scale, minus the proportion of (single) men under the low income threshold.

3.1. Demography and Health

Unsurprisingly, demographic indicators are among the most comparable indicators between countries and also the ones that have a broader coverage of countries. Still, for some countries of the CIS there are still gaps in the information available for some years, which could limit the analysis of demographic trends over a wide period of time.

On health indicators there have been improvements on the availability of data. Still, reliance on self-reported health may be prone to reflect cultural bias. Data on disability trends remains scarce and lacks comparability. This in turn limits the knowledge of disability trends in old-age, which is of crucial importance to define future dependency needs in face of increasing life expectancy.

Group		Definition	Source	Notes
Demography	Ageing	Share of population aged 65+ and 80+	<i>Eurostat, UNECE and UNPP</i>	1990-2006
		Old-age dependency ratios	<i>Eurostat, UNECE and UNPP</i>	1990, 2006
		Gender ratio at the age of 65 and 80	<i>Eurostat, UNECE and UNPP</i>	2006
		Current and projected share of the population aged 65+ and 80+	<i>EUROPOP2008 and UNPP</i>	2006, 2050
	Longevity	Life expectancy at age 65	<i>WHO European Health for All Database, OECD Health Data 2008, and Human Mortality Database</i>	2006
		Life expectancy at age 80	<i>OECD Health Data 2008, and Human Mortality Database</i>	2006
		Life expectancy gains at age 80	<i>OECD Health Data 2008, and Human Mortality Database</i>	1990 onwards
		Difference in life expectancy at age 65 and 80, by gender	<i>WHO European Health for All Database, OECD Health Data 2008, and Human Mortality Database</i>	2006
Health	Prevalence of disability	Population 65+ with severe disability by age group	<i>Lafortune et al (2007)</i>	Time series
		Population with severe activity restriction, by gender and age group	<i>Eurostat, EU-SILC</i>	2006, (Self-reported)

	Prevalence of Alzheimer	Prevalence rates of dementia, by gender and age group	<i>Own calculations based on Eurostat and Alzheimer Europe (2006)</i>	2005
	Healthy life years	Healthy life expectancy	<i>EHEMU</i>	2005

3.2. Living arrangements of older people and informal care

Given the importance of informal care provided by spouses in later stages of life, living arrangements prove crucial to establish demand for formal long-term care. Still, most information is only available through census data, conducted at best every decade only.

Two particular issues still afflict data on informal care: unavailability of data altogether and comparability. Most data available on informal care was collected through ad-hoc surveys. Indispensable as they are to at least research informal care, different sample designs and definitions used limit the comparability among countries or in time. Thus far, other broader surveys on the general population have not proven adequate to study informal care. Unless households with older people or frail elderly are systematically over-represented in the sample, too fewer cases would be available to allow for meaningful indicators to be calculated (Huber and Rodrigues, 2008). The recently available SHARE data, focusing on older Europeans, has the potential to overcome this problem and allow for meaningful comparisons between countries and in time.

Group		Definition	Source	Notes
Living arrangements of older people		Living arrangements of population 60+ by gender and age group	<i>UNDESA/Population Division, Living Arrangement of Older Persons Around the World (2005), Eurostat 1990 and 2001 Census data, National data</i>	1990s and 2001, Types of living arrangement: -Living as a couple -Living with a child -Living alone -Living with others
		Mobility in old age (preferences)	<i>Eurobarometer</i>	2008, Question 26a
Informal care	Family care	Percentage of the population aged 15+ providing informal care to a relative aged 60+, by residence	<i>Own calculations based on A. Walker (1999)</i>	1999, Residence refer to co-residence of carer and care recipient. May in the future be supplemented by SHARE data.

		Family carers, by gender and age group	<i>National sources, OECD (2005), EUROFAMCARE national reports (2004)</i>	Various years depending on availability of national data. May in the future be supplemented by SHARE data
		Proportion of women providing heavy care to elderly family member	<i>Mestheneos et al. (2005)</i>	May in the future be supplemented by SHARE data.
		Relation of carer to care recipient	<i>National sources, OECD (2005), EUROFAMCARE national reports (2004)</i>	Various years depending on availability of national data. May in the future be supplemented by SHARE data
		Duration of provision of family care	<i>Lamura G. et al. (2006)</i>	May in the future be supplemented by SHARE data.
		Family help as a % of help to people aged 75+, by domain	<i>National sources, EUROFAMCARE national reports (2004)</i>	2000 / 2001. May in the future be supplemented by SHARE data
	Employment status of informal carers	Labour force participation of main caregivers, by domain	<i>National sources, EUROFAMCARE national reports (2004)</i>	Various years depending on availability of national data. May in the future be supplemented by SHARE data
Informal care/Employment	Conciliation of work and care duties.	Employment status of main carers, by domain	<i>National sources, EUROFAMCARE national reports (2004), Lamura G. et al. (2006)</i>	Various years depending on availability of national data
		Restrictions experienced by carers, by employment status	<i>Lamura G. et al. (2006)</i>	
		Preferences to care provision	<i>Eurobarometer</i>	2008, Question 7a, 29.1

3.3. Beneficiaries of formal long-term care (home care and institutional care)

Data on the beneficiaries of formal care is part of the core information on long-term care services that governments should collect. Still, availability of disaggregated data on gender or age groups is not always assured. Furthermore, the distinction between disability and old-age is not always clear.

Recent policy developments such as the introduction of cash benefits (e.g. direct payments, attendance allowances) have blurred the frontiers not only between formal and informal care, but also between care at home and in institutions. The same applies for formal care settings such as assisted living – different countries use different definitions to distinguish between institutional and home care. Data on intensity of care provided (e.g. number of hours of care) is also not always available.

Conciliation between international databases and national sources remains problematic, even when data is supposed to account for similar information.

Group		Definition	Source	Notes
Formal care	Old-age beneficiaries of formal care	Old-age beneficiaries of formal care services, both at home and in institutions (percentage of old-age population)	<i>OECD HD, NOSOSCO, National sources</i>	Formal long-term care services are those that are supplied through employees of organizations, either public or private, as well as those that receive cash benefits from the State. For some countries for 1995 to 2007.
	Old-age beneficiaries of formal home-care	Old-age beneficiaries of formal care services in their own home (percentage of old-age population)	<i>OECD HD, NOSOSCO, National sources</i>	Includes those living in assisted living environments and benefiting from cash benefits such as care allowances. For some countries for 1995 to 2007.
	Old-age beneficiaries of residential care	Old-age beneficiaries of formal care services in institutions (percentage of old-age population)	<i>OECD HD, NOSOSCO, National sources</i>	For some countries for 1995 to 2007.
	Old-age beneficiaries of cash for care	Old-age beneficiaries of cash for care benefits (percentage of old-age population)	<i>OECD HD, NOSOSCO, National sources</i>	Includes those benefiting from care allowances and attendance allowances. For some countries for 1995 to 2007.
	Gender dimension of care	Differences in probability of receiving formal care services by gender	<i>OECD HD, NOSOSCO, National sources</i>	Only for old-age beneficiaries, with breakdown between home and residential care.
	Age targeting of care	Differences in probability of receiving formal care services by age group	<i>OECD HD, NOSOSCO, National sources</i>	Only for old-age beneficiaries, with breakdown between home and residential care. Age-groups considered are usually 65-79 and 80 and older.

3.4. Expenditure and financing of long-term care

As the profile of long-term care has risen in public policy and in the context of demographic ageing, data on public expenditure has improved. To some extent, improved data collection is one of the first impacts of establishing long-term care systems.

Despite the importance of properly accounting for public expenditure, basic information on expenditure is still lacking. Most of the gaps identified above for the beneficiaries of formal care carry through to data on expenditure. As with data on beneficiaries, increased reliance on cash benefits may blur the frontiers between home and institutional care, but also between public and private expenditure.

Indirect data presented in the publication "Facts and Figures on Long-term Care" hints at the importance that private expenditure may have in financing long-term care. Aggregate data on private expenditure however, remains limited.

Group		Definition	Source	Notes
Expenditure on long-term care	Expenditure	Public expenditure on long-term care in percentage of GDP	<i>OECD HD, Eurostat ESSPROS, National sources</i>	Whenever possible there will be a breakdown in old-age and disability; home, institutions and cash benefits. Time-series for 1995-2006.
	Drivers of expenditure	Real growth of public expenditure per capita	<i>OECD HD, Eurostat ESSPROS, National sources</i>	Real growth in public expenditure per capita, during the 1995-2006 period for selected countries
	Benefit generosity	Average benefits in percentage of APW and beneficiaries in percentage of 65+ population	<i>National sources, Eurostat, MISSOC, OECD</i>	Available for different cash benefits, latest available data (2002-2007). Breakdown between cash benefits typology.
	Benefit generosity - distribution	Distribution of beneficiaries of cash benefits by benefit amounts	<i>National sources</i>	Available for a limited number of countries.
	Projection of future expenditure on long-term care	Projected change in public expenditure on long-term care.	<i>OECD HD, Eurostat ESSPROS, National sources</i>	Standardization of expenditures based on common age and expenditure structures
Private cost-sharing and affordability of care	Private expenditure on long-term care	Private expenditure on long-term care in percentage of GDP	<i>OECD HD, National sources</i>	Breakdown available between institutional and home care.

	Affordability of residential care	User's fee for residential care in percentage of the OECD APW wage	OECD, EUROFAMC ARE, National sources	For selected countries and regions within countries.
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3.5. Outcomes and quality

Quality of care remains one of the most challenging issues on which to gather information, reflecting the lack of harmonised systems of quality on a national level.

Group		Definition	Source	Notes
Quality of care	Privacy	Privacy in care homes (distribution of residents by number of beds in room)	OECD, National sources	For selected countries. Includes evolution between two points in time.

PUBLICATIONS

The main outcome of our work on long-term care indicators, the book *"Facts and Figures on Long-term Care: Europe and North America"*, has been published in 2009. This publication covers all aspects relevant to care policy, namely demographic background; changing living arrangements and household patterns; trends in informal care giving; as well as availability, quality and expenditure on professional long-term care services. This publication will be accompanied by a publication on the sources and estimation methods used.

The other book on women and pensions, *"Women's Work and Pensions: What is Good, What is Best? Designing Gender-Sensitive Arrangements"* (edited by Bernd Marin and Eszter Zólyomi), is currently being completed. The book explores the difficulties women face during their working life and in retirement and the gender implications of social and pension policies. The book contains valuable contributions from international pension and social policy experts, and there is also a section on statistical information containing a number of different indicators focusing on gender differences.

EVENTS

A presentation of long-term care indicators has taken place at the international expert meeting in Jerusalem, 6-9 September 2009. The European Centre jointly with the Ministry of Social Affairs and Services of the State of Israel organized this workshop. This workshop provided a useful forum for discussing the further strategy towards a

more routine exchange of trends and policies in providing long-term care for older people.

As part of the European Centre`s international seminar series, Pieter Vanhuysse presented his paper titled “Elderly Bias, New Social Risks, and Social Spending: Investigating Change and Timing in Eight Programs Across Four Worlds of Welfare, 1980-2003”, while Agota Scharle provided a presentation of her research on the effect of child care provisions on female labour supply in Europe and a related proposal for changing family policy in Hungary.

The workshop and seminar presentations have been disseminated via notes on the website and the newsletters.

WEBSITE DEVELOPMENT

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

We implemented the following measures to simplify the structure and communicate the content of the website more effectively:

- ❖ Deleted the local layer of the website (the only case we kept the local layer was in **Networks and NGOs**);
- ❖ Created clear content headings with corresponding sub-headings;
- ❖ Put **Policies and Strategies** with **Implementation Activities** under the new heading of **Key Documents**;
- ❖ All contents related to mainstreaming ageing indicators (previously under “Tools, Facts and Figures”) have been reorganised under the new heading **Indicators**;
- ❖ Made a separate heading for ageing related publications (**Publications**) and will disseminate information about ageing-related conferences and workshops under the new heading: **Events**;
- ❖ Merged **Networks and NGOs** (these used to be two separate headings).

Continuing in the 2nd phase of the MA:IMI project, we aim to review how the information included in the website can be best obtained and then further disseminated. With all the experience of building, expanding and promoting the website successfully

during the 1st phase of the project, we are best placed to know about fields that are worth continuing to and the fields that need to be developed.

One particular part of the website we aim to further develop is the content organised under **Indicators**.

NEWSLETTER

The first issue of the new quarterly MA:IMI newsletter, titled “Mainstreaming Ageing - Supporting the UNECE Regional Implementation Strategy for the Madrid International Plan of Action on Ageing”, will be published on the 1st of December 2009. It will be used for awareness raising amongst the key stakeholders reporting on new findings, website updates, new publications, interesting discussions in the international seminars, and on networking activities. These newsletters will be widely disseminated using proven European Centre partner channels. The newsletter will be produced every three months, and thus it will provide a short, timely and precise way to disseminate relevant information to UNECE member countries. This will provide a regular information medium that bundles the MA:IMI services portfolio and it helps in building awareness of the issues faced and solutions sought in UNECE member countries.