UNITED NATIONS ECONOMIC COMMISSION FOR EUROPE

Preparation of national reports for the fourth review and appraisal cycle of the implementation of the Madrid International Plan of Action on Ageing and its Regional Implementation Strategy (MIPAA/RIS)
2018 - 2022

Guidelines for National Reports

September 2020

Adopted by the Bureau of the Standing Working Group on Ageing

Table of Contents

Table of Contents

Introduction and Timetable

Modalities for the fourth review and appraisal of the Madrid International Plan of Action on Ageing, 2002, agreed by the Member States at the 58ᵗʰ session of the Commission for Social Development were endorsed by the ECOSOC Resolution 2020/8 in June 2020.[1]

The Madrid International Plan of Action on Ageing (MIPAA) adopted by the Second World Assembly on Ageing, held in Madrid from 8 to 12 April 2002, requested a systematic review of its implementation as being essential for the Plan's success in improving the quality of life of older persons. The UNECE Regional Implementation Strategy (RIS) for MIPAA adopted by the UNECE Ministerial Conference on Ageing, held in Berlin in 2002, reaffirmed this requirement.

The review and appraisal of the Madrid Plan of Action takes place every five years. The process involves a participatory "bottom-up" element engaging civil society and older persons themselves and is designed to assist Member States in receiving feedback on the policies and programmes they have implemented. Member States are encouraged to utilize this process along with traditional reporting methodologies.

Following the review and appraisal at the national level, United Nations Regional Commissions coordinate consolidation of information at the regional level. Review and appraisal processes culminate with a global review at the Commission for Social Development.

In its resolution 2020/8, the ECOSOC endorsed the timeline for carrying out the fourth review and appraisal of MIPAA, as outlined in the Secretary-General's report on Modalities for the fourth review and appraisal of the implementation of the Madrid International Plan of Action on Ageing, 2002.[2] In keeping with the mandated timeline, the calendar is as follows:

> **2021:** National Reviews and Appraisals take place
>
> **2022:** Regional Review Processes take place
>
> **2023:** Commission for Social Development at its sixty-first session presents Global Review Outcomes

UNECE Regional Review

In the UNECE region, the first three cycles of review and appraisal of MIPAA/RIS implementation were concluded by UNECE Ministerial Conferences in 2007 (Leon, Spain), 2012 (Vienna, Austria) and 2017 (Lisbon, Portugal). **The fourth review and appraisal of MIPAA/RIS is being initiated with the issuance of these guidelines for national reporting**.

---

[1] https://www.un.org/ga/search/view_doc.asp?symbol=E/RES/2020/8
[2] https://undocs.org/en/E/CN.5/2020/4

The UNECE Standing Working Group on Ageing at its 12ᵗʰ meeting on 18-19 November 2019 agreed on the following timeline for the fourth review and appraisal of MIPAA/RIS in the region:[3]

- **October 2020-September 2021** – national reviews and appraisal processes.
- **30 September 2021** – deadline for submitting national reports to the UNECE secretariat.
- **30 March 2022** – synthesis report prepared by the UNECE secretariat.
- **June (tbc) 2022** – UNECE Ministerial Conference on Ageing.

The national reports are a crucial part of the review and appraisal exercise and provide the basis for the regional synthesis report on MIPAA/RIS implementation.

The present guidelines are designed to assist UNECE member States in reporting on the national follow-up to the MIPAA/RIS during the period 2018 - 2022. They are intended for national focal points on ageing in charge of preparing the country report as well as other relevant stakeholders involved in the process. It is hoped that the outline provided in this document will help focal points to organize existing and newly collected material into a concise document.

For your information:
- all country reports received for previous cycles (2007, 2012 and 2017) can be found at: www.unece.org/population/mipaa/reviewandappraisal.html.
- the key documents - MIPAA, RIS and Ministerial declarations - could be accessed in English, French, and Russian on https://www.unece.org/population/ageing.html

---

[3] For more details see: Preparations for the fourth review and appraisal of the implementation of the Madrid International Plan of Action on Ageing - ECE/WG.1/2019/RD1 http://www.unece.org/index.php?id=50641

Outline of the report on the follow-up to the Regional Implementation Strategy of the Madrid International Plan of Action on Ageing in [country]

Part I

Executive summary (by National Focal Points on Ageing)

Approximately 500 to 700 words (1-1.5 A4 pages, single-spaced).

Please provide an executive summary according to the structure below:

- Methods used for this report; in particular, details of the bottom-up participatory approach used, if any.
- Brief review of national progress in fulfilling (or lagging behind) the commitments of MIPAA/RIS. Include **three to five major achievements since 2017 and three to five important aspects to be improved in the future.**
- Conclusion.

General information

This section should contain brief information about the member State and the entities submitting the report, in particular:

1. Country name
2. Name and contact details of the author(s) of the report
3. Name and contact details of official national focal point on ageing
4. Name, reference, and date of adoption or status of preparation of national strategy, action plan or similar policy document on ageing (please attach relevant documents in the annex).

---

1. National ageing situation

Approximately 500 words, (1 A4 page, single-spaced, excluding annexes).

This section should include a brief **overview of the national ageing situation with respect to demographic, social, economic and political developments**, and, in particular major challenges related to population ageing in the country.

One of the key objectives of the national reports is to allow member States to share good practices and novel approaches to similar challenges and opportunities related to the ageing of their societies, taking into account the different contexts in which population ageing evolves.

Therefore, this section may consist of the following:

1. **Presentation of current demographic indicators and their projections** that could help better understand the country's development regarding the issues discussed. <u>Which demographic change occurred during the last twenty years?</u>

2. **Presentation of key quantitative social and economic indicators** and characteristics that may help to bring into focus the issues discussed and to permit quantitative analysis. <u>What was the impact of the demographic change for society in your country?</u>[4]

3. **Brief description of the social, economic and political situation**, which may help to understand the context in which ageing-related issues are dealt with in your country.

4. The COVID-19 pandemic greatly affected the social and economic situation across the countries. **Brief description of important measures to revise/adjust social and economic policies due to the confinement and economic shut-down**, if any.

Suggestion: you may provide more detailed analytical tables and charts in the annex.

---

2. Method

Up to 500 words (1 A4 page, single-spaced, excluding annexes).

This section should deal with the methods used for an evaluation of policy actions taken towards the implementation of MIPAA/RIS within the framework of the ten commitments of RIS since 2002 and especially under the three main goals of the 2017 Lisbon Ministerial Declaration.

It is suggested that both a quantitative and a qualitative approach be used for assessing the impact of policy actions:

*   **Quantitative information** can be taken from ongoing and new studies on ageing, both cross-sectional (assessing the impact of policies across several sectors) and longitudinal (observing a specific policy impact over a period of time). For the comparative picture at the regional level, data on available indicators composing the Active Ageing Index and those from the comparable/harmonised surveys could be recommended.

*   **Qualitative information** can be obtained through **a bottom-up participatory approach or other available qualitative data from recent research** (preferably undertaken since 2017). If member States wish to conduct new qualitative research for the purpose of this report, the participatory approach may be a suitable tool, as it calls for the involvement of older persons in assessing the impact

---

[4] See for instance the European Commission's report on the impact of demographic change
https://ec.europa.eu/info/strategy/priorities-2019-2024/new-push-european-democracy/impact-demographic-change-europe

of policy actions on the quality of their lives. This approach is flexible and can be adapted to country-specific challenges and opportunities.[5]

In general, this section should refer **to interactions with the different stakeholders** – such as ministries, regional and local authorities, non-governmental organizations (NGOs), the private sector, social partners, academia and organizations representing the interests of older persons and of young persons - especially in the context of inter-generational relations – and on how these interactions contributed to the report. A short paragraph and/or figure of the network view that captures the overall process and stakeholders' roles could be included in this section.

This section should also describe the review and appraisal coordinating mechanism: the ECOSOC resolution 2020/8 on **"Modalities for the fourth review and appraisal of the Madrid International Plan of Action on Ageing, 2002"** in its paragraph 4 "*encourages* Member States to establish or strengthen a national coordinating body or mechanism, as appropriate, in order to, inter alia, facilitate the implementation of the Madrid Plan of Action, including its review and appraisal." When applicable, **the links between the review and appraisal of MIPAA/RIS and other established monitoring mechanisms** in your country, for instance on implementation of SDGs, should be discussed here.

Part II: 20 Years of MIPAA/RIS

Main actions and progress in implementation of MIPAA/RIS and the 2017 Lisbon Ministerial Declaration goals

The **Madrid International Plan of Action on Ageing** was adopted by the Second World Assembly on Ageing, held in Madrid in 2002[6] and its **UNECE Regional Implementation Strategy**[7] highlighting ten commitments was endorsed the same year at the UNECE Ministerial Conference on Ageing, held in Berlin.

In 2017, the UNECE Ministerial Conference concluded the 3rd review and appraisal of the MIPAA/RIS implementation in the region under the theme "A Sustainable Society for All Ages: Realizing the potential of living longer". The Conference adopted the **2017 Lisbon Ministerial Declaration**[8] comprising three main goals:

I. Recognizing the potential of older persons
II. Encouraging longer working life and ability to work
III. Ensuring ageing with dignity.

In this section, **please provide a short analysis of the implementation of the 2017 Lisbon Ministerial Declaration goals and measures during the last five years** including what has been achieved/lagging (successes and setbacks, as well as reasoning

---

[5] For a detailed description of the bottom-up participatory approach see: UNDESA (2006), 'Guidelines for Review and Appraisal of the Madrid International Plan of Action on Ageing: Bottom-up Participatory Approach' https://www.un.org/development/desa/ageing/publications/2015/08/guidelines-for-review-and-appraisal-of-the-mipaa-bottom-up-participatory-approach/

[6] https://www.unece.org/fileadmin/DAM/pau/age/mica2002/documents/Madrid2002Report.pdf

[7] https://www.unece.org/fileadmin/DAM/pau/age/mica2002/documents/ECE_AC23_2002_2_Rev6_e.pdf

[8] https://www.unece.org/index.php?id=45245

behind both), good practices and lessons learned. Pay particular attention to the cross-cutting impact of RIS commitments 8 (mainstreaming gender) and 10 (regional cooperation) in every question. Finally, **highlight in a nutshell the most important achievement** in the implementation of MIPAA/RIS **during the last 20 years** and give **recommendations for future actions** (what is planned/needs to be done).

1. Recognizing the potential of older persons

1.1. What has been done to **empower individuals to realize their potential** for physical, mental and social well-being throughout their lives and to participate in and contribute to society according to their capacities, needs, and desires along the **RIS commitments 1, 2, 8, 9, and 10** and the goals of the **Lisbon Ministerial Declaration**?

- ❖ developing and implementing socially responsible and future-oriented economic and financial strategies
- ❖ fostering effective consultations with, and involvement of, older persons and their representatives at the national, regional and local levels in designing policies
- ❖ promoting a positive image of older persons, acknowledging their contributions to society
- ❖ fostering work and volunteering of younger and older persons in intergenerational settings
- ❖ encouraging businesses, non-profit organizations and public enterprises to involve older persons as consumers in the planning and design of goods and services
- ❖ ensuring that older persons can attain and maintain their highest possible level of health and functional capacity by supporting the development of age-friendly environments and housing.

1.2. Please also reflect on **your country's participation in the relevant global/UN-wide campaigns:**

1.2.1. Does your country take part in a **Global Campaign to Combat Ageism** led by the World Health Organization (WHO)[9]? Do the activities in your country contribute to the endeavours of this WHO-led campaign? Which ones? Did your participation in the campaign contribute to the implementation of the MIPAA/RIS in your country? **Which measures have been set in this context?**

1.2.2. Does your country take part in the United Nations **Open-ended Working Group on Ageing (OEWG-A)** for the purpose of strengthening the protection of the human rights of older persons? Do the activities in your country contribute to the endeavours of the OEWG-A? Which ones? Do national policies ensure protection of the human rights of older people in your country? **Do you see any legal gaps?**

1.3. Highlight in a nutshell the **most important policy achievement during the last 20 years** to contribute to empowering individuals to realize their potential for physical,

---

[9] https://www.who.int/ageing/ageism/campaign/en/

mental and social well-being throughout their lives and to participate in and contribute to society.

Give some examples how thinking, feeling and dealing with ageing has changed during the last 20 years and give some recommendations for future action (what is planned/needs to be done) to avoid ageism.

> *Suggestion*: *this could be a good question for dialogue with older persons and civil society.*

2. Encouraging longer working life and ability to work

2.1. Which measures have been implemented **to recognizing the potential embedded in the employment of older workers and developing labour market strategies** to promote maximum participation opportunities for workers of all ages along the **RIS commitments 3, 4, 5, 6, 8 and 10** and the goals of the **Lisbon Declaration?**

  ❖ promoting lifelong learning opportunities
  ❖ fight unemployment at all ages, reducing financial inequalities and poverty, taking up measures to reduce the gender pay gap
  ❖ encouraging employers to value the experience of, and to retain and hire, older workers
  ❖ providing incentives for longer working life opportunities and more flexible retirement choices
  ❖ planning and implementing pension reforms, that take into account the increasing longevity and the extension of working lives
  ❖ facilitating the reconciliation of employment and care work.

2.2. Which **special measures** did your country set to **close the gender pay and pension gap** as well to take into account the **special situation of older women?**

2.3. Highlight in a nutshell **the most important achievement during the last 20 years** in recognizing the potential embedded in the **employment of older workers and developing labour market strategies** to promote maximum participation opportunities for workers of all ages? Give some recommendations for future action (what is planned/needs to be done).

3. Ensuring ageing with dignity

3.1. Which measures have been contributing to **protecting older persons' enjoyment of all human rights and dignity, promoting their autonomy, self-determination and participation in society,** and making sure that no law, policy or programme leaves room for discrimination of any kind along **RIS commitments 7, 8, 9 and 10** and the goals of the **Lisbon Declaration?**

❖ protecting older persons' enjoyment of all human rights and dignity, promoting their autonomy, self-determination and participation in society,

❖ supporting the necessary infrastructure and assistance to prevent all types of abuse and violence against older persons,

❖ fostering the development of innovative methods and services as well as user- and age-friendly technology and products,

❖ raising quality standards for integrated social and long-term care and health services and continuously adapting the status, training and working conditions of professional care workers,

❖ supporting research on individual and population ageing processes to better address emerging needs in ageing societies,

❖ promoting the participation of both persons with dementia and/or mental and behavioural disorders and their informal carers in social and community life,

❖ respecting the self-determination, independence and dignity of older persons, especially, but not limited to, towards the end of life.

3.2. Highlight in a nutshell the **most important achievement during the last 20 years to protecting older persons' enjoyment of all human rights** and to raising **quality standards for integrated social and long-term care** and health services as well as adapting the status, training and working conditions of professional care workers. Give some recommendations for future action (what is planned/needs to be done).

Part III: Healthy and Active Ageing in a Sustainable World

1. Contribution of ageing-related policies to the implementation of the 2030 Agenda and its Sustainable Development Goals

The **2030 Agenda for Sustainable Development**, adopted by all United Nations Member States in 2015, provides a shared blueprint for peace and prosperity for people and the planet, now and into the future**.** At its heart are the **17 Sustainable Development Goals (SDGs)**,[10] which are an urgent call for action by all countries - developed and developing - in a global partnership. They recognize that **ending poverty** and other deprivations must go hand-in-hand **with strategies that improve health and education, reduce inequality, and spur economic growth** – all while tackling climate change and working to preserve our oceans and forests.

---

[10] https://www.un.org/sustainabledevelopment/sustainable-development-goals/

At the heart of the SDGs is the promise "to leave no one behind". This entails ensuring that every individual, including every older person, is included in development efforts. In his Report on the Modalities for the fourth review and appraisal of the implementation of the Madrid International Plan of Action on Ageing 2002, the Secretary-General states in paragraph 12: "[...] Efforts to implement the Madrid Plan of Action will therefore contribute to accelerating progress towards the realization of the 2030 Agenda."[11]

1.1. Has your country already submitted voluntary national report(s) (VNR) to the High-Level Political Forum (HLPF) on the implementation of the SDGs? Please briefly report on whether and how the **population ageing and older persons' issues were addressed** in your country's VNR(s).

1.2. Within the national political planning are there any established links between ageing issues and the 2030 Agenda (a mapping of the connections between MIPAA/ RIS and the SDGs that shows areas for policy integration is available on the UNECE website[12])?

1.3. Given the information reported about MIPAA/RIS implementation, **what are the most relevant SDGs which could be nourished by current policy measures** (specify which measures)? Were they or will they be included in your country's VNR(s)? Describe 1–3 good practice examples.

2. Lessons learnt from managing the consequences and impacts for older people in emergency situations: the COVID-19 pandemic

In May 2020, the United Nations Secretary-General launched a Policy Brief: 'The impact of COVID-19 on older persons' with four key priorities for Member States' action:[13]

- ❖ Ensure that difficult health-care decisions affecting older people are guided by a commitment to dignity and the right to health.
- ❖ Strengthen social inclusion and solidarity during physical distancing.
- ❖ Fully integrate a focus on older persons into the socio-economic and humanitarian response to COVID-19.
- ❖ Expand participation by older persons, share good practices and harness knowledge and data.

Please describe briefly the main measures that have been set **in your country** to **protect older persons** and to address the four focus areas as outlined above. Please also indicate if and how policy approaches have changed, in light of the lessons learned since the start of the pandemic.

---

[11] https://undocs.org/E/CN.5/2020/4
[12] http://www.unece.org/fileadmin/DAM/pau/age/PS2018/
00_MIPAA_RIS_2030_Agenda_Areas_for_Policy_Integration.pdf)
[13] https://www.un.org/development/desa/ageing/wp-content/uploads/sites/24/2020/05/COVID-Older-persons.pdf.

2.1. How were older people affected by Covid-19 in your country? Was there a higher share of hospitalisation and rate of deaths among older people in 2020 than for population in general and in relation to previous long-term observations?

2.2. **What has been done to ensure that difficult health-care decisions affecting older people are guided by a commitment to dignity and the right to health?** Please reflect on the recommendations of the Secretary-General's Policy Brief, when applicable, and briefly describe the main challenges and 3 - 5 good practices.

2.3. What has been done to strengthen social inclusion and solidarity during physical distancing? Please reflect on the recommendations of the Secretary-General's Policy Brief, when applicable, and briefly describe the main challenges and 3 - 5 good practices.

2.4. What has been done to fully integrate a focus on older persons into the socio-economic and humanitarian response to COVID-19? Please reflect on the recommendations of the Secretary-General's Policy Brief, when applicable, and briefly describe the main challenges and 3 - 5 good practices.

2.5. What has been done to expand participation by older persons, share good practices and harness knowledge and data? Please reflect on the recommendations of the Secretary-General's Policy Brief, when applicable, and briefly describe the main challenges and 3 - 5 good practices.

3. Activities in preparation and implementation of the WHO Decade of Healthy Ageing 2020 – 2030

In August 2020, the 73rd World Health Assembly have endorsed the proposal for a [Decade of Healthy Ageing (2020-2030)](.)[14] The World Health Assembly asked the WHO Director-General to transmit this decision to the Secretary-General of the United Nations for consideration of the proposal for the Decade by the United Nations General Assembly.

3.1. Is your country preparing (or already has) a **National Action Plan** (or similar) **for the implementation of the WHO Decade of Healthy Ageing 2020 – 2030**? If yes, please briefly describe main actions foreseen.

3.2. Would your country agree to report on the implementation of the WHO Decade of Healthy Ageing 2020 – 2030 in the framework of the next national reviews and appraisals of MIPAA/RIS?

---

[14] The Decade proposal document is available on https://www.who.int/ageing/decade-of-healthy-ageing

Conclusions and priorities for the future

Up to 1,000 words (no more than two A4 pages).

This final part should contain an overall summary of the findings, future challenges and opportunities related to ageing; recommendations for future actions to be taken; and policy adjustments needed. It should cover both progress towards the Lisbon Ministerial Declaration goals and, in a nutshell, major achievements over the twenty years of MIPAA/RIS. Please identify also priorities for further policy research and indicate your country's requests, needs and wishes with regard to the work of international organizations in the field of ageing.

_____

Annexes

This section may contain any important and essential information/documents or statistical data that otherwise could not be included in the report itself.

Member States are also invited to provide an annex with statistical data for the indicators included in the Active Ageing Index (or their proxy measures). For the indicator description check general AAI methodology and Guidelines for Active Ageing Index (AAI) in non-EU countries and at subnational level, both available on AAI Wiki.[15]

---

[15] https://statswiki.unece.org/display/AAI/Active+Ageing+Index+Home