



Implementing the Madrid Plan of Action on Ageing

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“The world has changed almost beyond recognition since the first World Assembly on Ageing in 1982. Where once population ageing was mostly a concern of developed countries, today it is gaining real momentum in developing countries as well. And where once ageing may have been thought by some to be a stand-alone issue or an afterthought, today we understand that such a dramatic demographic transformation has profound consequences for every aspect of individual, community, national and international life”.

-- Secretary-General Kofi Annan

A Definition of Ageing

The United Nations identifies – exclusively for the purpose of demographic comparison – populations who have reached the age of 60 years as “older persons”. Today, world-wide, there are around 690 million persons aged 60 years and over; this total will almost double by 2025 and is expected to reach nearly two billion by 2050. The vast majority of these older persons will reside in the developing world.

Ageing should be considered from two major perspectives: demographic and individual. From the *demographic* perspective, ageing is a population process, caused by declining fertility and mortality rates, which manifests itself in the growing number of older persons in society. *Individual* ageing is a process of individual progression through the life course, particularly its latest stages. It is important to consider both these perspectives of ageing, and the implications they carry for society and for the individual and his or her family.

From a demographic perspective, nothing short of a revolution is underway:

- One out of every nine persons is now 60 years or above; by 2050, one out of five will be 60 years or older; and by 2150, one out of three persons will be 60 years or older.
- The older population itself is ageing. The oldest old (80 years or older) is the fastest growing segment of the older population. They currently make up 13 percent of the 60+ age group and will grow to 20 percent by 2050. The number of centenarians (aged 100 years or older) is projected to increase 13-fold from approximately 287,000 in 2006 to 3.7 million by 2050.
- The majority of older persons (55 percent) are women. Among the oldest old, 64 percent are women.
- Striking differences exist between regions. One out of five Europeans, but only one out of twenty Africans, is 60 years or older.
- The majority of the world's older persons (51 percent) live in urban areas. By 2025 this is expected to climb to 62 percent of older persons, although large differences exist between more and less developed regions. In developed regions, 74 percent of older persons are urban dwellers, while in less developed regions, which remain predominantly rural, 37 percent of older persons reside in urban areas.
- While it is true that older persons comprise a larger proportion of the population in developed countries, sheer numbers are far larger in less developed countries.

Over the last half of the 20th century, 20 years were added to the average lifespan, bringing global life expectancy to its current level of 66 years. Large differences exist between countries, however. In some less developed countries, and particularly those ravaged by conflict and disease, life expectancy continues to hover in the mid-40s. Men in the least developed countries who reach the age of 60 can expect only 15 more years of life, while women can look forward to 17 more years; in more developed regions, life expectancy at age 60 is 19 years for men and 23 years for women.

The increase in the number of older persons will be greatest and most rapid in developing countries, where, on average, the older population is expected to almost quadruple in the next 50 years. In Asia and Latin America, the proportion of persons classified as older will increase from 9 to 15 percent between 2006 and 2025. In Africa the proportion is expected to grow from 5 to 6 percent during the period, but to double to 10 per cent by 2050, although in sub-Saharan Africa, HIV/AIDS and economic and social hardships will keep the percentages lower than in the continent as a whole. During the same time period (2006-2025) the percentage of older persons in Europe will grow from 21 to 28 percent, while in North America it will grow from 17 to 24 percent.

More people are living into old age and spending more years than ever before in old age. This has important consequences for the types of social provisioning and the patterns of resource mobilization that will be required to meet the service needs of ageing populations. In many developed countries, which have longer experience with ageing populations, one of the dilemmas is how to continue to provide the critically needed services for older persons without creating or exacerbating intergenerational inequity. In the developing countries, where rapid rates of population ageing are occurring at the same time that social support is still mostly provided by extended families, such support – where it still exists – is becoming increasingly unreliable and inadequate; where no formal social safety nets exist for older persons, the challenge becomes to determine what basic services should be provided to those older persons who have no children or whose children lack resources to provide care, and how best to provide that care.

The issues that fill our later years clearly warrant careful attention, but at the same time a focus on demographic challenges can mask the markedly different prospects that face older people in different parts of the world. Many people in some parts of the developing world – and even some people in parts of the wealthiest countries – face a troubling reality, as old age comes earlier for those worn down by the physical wear and tear of poverty and disease. While individuals in the majority of countries are within reach of extended life spans, life expectancy at birth has experienced alarming declines in some developing countries and countries with economies in transition suffering the devastating effects of war, economic deterioration and HIV/AIDS.

The Second World Assembly on Ageing

The international meeting held in Madrid, Spain in April 2002 brought together representatives of 156 countries to consider the global situation of older persons. A total of 173 speakers took the floor in the five-day general exchange of views in the Assembly's plenary. Four heads of State, one Vice-President and 48 Ministers addressed the Assembly, and one thousand representatives of non-governmental organizations participated. Secretary-General Kofi Annan opened the Assembly.

Marking the twentieth anniversary of the First World Assembly on Ageing, the Second Assembly considered progress and setbacks that occurred in two decades and launched a global effort to

address the demographic revolution that is taking place all over the world. The 1982 Plan of Action essentially considered ageing in the context of issues and concerns of the developed countries, as at that time many developing countries did not consider the issue of ageing to be a pressing concern. In Madrid it was recognized that demographic changes will be greatest and most rapid in developing countries, and so they, too, must address the global force of population ageing and its impact on development. The Assembly considered ageing in the context of strategies for the eradication of poverty, as well as efforts to achieve full participation of all developing countries in the world economy.

Responding to growing concern over the speed and scale of global ageing, the Assembly adopted two main outcome documents – a Political Declaration and an implementation plan, the Madrid International Plan of Action on Ageing. The texts promote a new recognition that ageing is not simply an issue of social security and welfare but of overall development and economic policy. They also stress the need to promote a positive approach to ageing and overcome the negative stereotypes associated with it.

Primary responsibility for achieving the objectives of the Plan lies with governments, acting in partnership with organizations of civil society, the private sector and older persons. International cooperation through the United Nations system is essential. National and international follow-up measures should start with mainstreaming ageing and the concerns of older persons into national development frameworks. Research should be directed at the individual, social and health implications of ageing, particularly in developing countries.

The Madrid International Plan of Action on Ageing

The Madrid Plan clearly focuses on developing countries because they will experience the process of population ageing most strongly in the twenty-first century. More importantly, these countries will have to respond to the implications of ageing with fewer economic and social resources than are available to the developed world as it confronts its own ageing issues. The international challenge will be to assist developing countries to avoid experiencing the ageing of their societies as an additional problem, but to derive from it added value and opportunities to promote development.

Perspectives and Objectives

The Second World Assembly on Ageing was a turning point in international policy debate and action on ageing. The Assembly recognized ageing as a global developmental phenomenon and supported the inclusion of ageing onto the international development agenda. This means that the ageing of society is recognized to have a strong impact on societal development – and provides an opportunity for that development – and older persons are embraced as a resource. There has been a strong move away – at least at the level of rhetoric – from a welfarist approach that categorizes older persons as merely in need of care and support – to a developmental approach which recognizes that the vast new numbers of older persons will – and necessarily must – be engaged as continuing agents of development and change.

The Madrid Assembly stated that: “The potential of older persons is a powerful basis for future development. This enables society to rely increasingly on the skills, experience and wisdom of older persons, not only to take the lead in their own betterment but also to participate actively in that of society as a whole”. Societies will no longer be able to afford to consider their older citizens unproductive. Experience from many developing countries already indicates that the contributions of older citizens are fundamental to economic and social well being.

The Plan is designed to guide policy formulation and implementation for successful adjustment to an ageing world. The success of this adjustment will be measured in terms of social development, improvements in quality of life for older persons and the sustainability of the various systems – formal and informal – that underpin that quality of well-being throughout life.

Overarching goals of the Madrid Plan of Action

- Realizing the human rights and fundamental freedoms of all older persons. Ensuring the full enjoyment of economic, social and cultural rights, and civil and political rights of persons and the elimination of all forms of violence and discrimination against older persons.
- Achieving secure ageing. Involves reaffirming the goal of eradicating poverty in old age and building on the United Nations Principles for Older Persons;
- Empowering older persons to participate in the economic, political and social lives of their societies, including through income-generating and voluntary work;
- Providing opportunities for individual development, self-fulfillment and well-being throughout life as well as in late life, through, for example, access to life-long learning and participation in the community while recognizing that older persons are not one homogenous group;
- Achieving gender equality among older persons through, inter alia, elimination of gender-based discrimination;
- Recognizing the crucial importance of families, intergenerational interdependence, solidarity and reciprocity for social development;
- Providing quality health care, support and social protection for older persons, including preventive and rehabilitative health care;
- Facilitating partnership between all levels of government, civil society, the private sector and older persons themselves in translating the International Plan of Action into practical action;
- Harnessing of scientific research and expertise and realizing the potential of technology to focus on, inter alia, the individual, social and health implications of ageing, in particular in developing countries.

Recommendations for action are organized in three priority directions:

- 1) Older persons and development;
- 2) Advancing health and well-being into old age; and
- 3) Ensuring enabling and supportive environments.

The first priority is closely related to the overall task of reconciling societal ageing and development. The recommendations are based on a human rights approach to development, which emphasizes the right to development for people of all ages. Ensuring equity across generations is a prerequisite for persons of all ages to participate in economic and social life and

to share in its benefits. The Madrid Plan identifies eight “developmental” issues where policy actions are required:

- 1) Active participation in society and development
- 2) Work and the ageing labour force
- 3) Rural development, migration and urbanization
- 4) Access to knowledge, education and training
- 5) Intergenerational solidarity
- 6) Eradication of poverty
- 7) Income security, social protection and poverty prevention
- 8) Emergency situations

The second priority is advancing health and well-being into old age. Here again, the developmental approach is evident from the emphasis on good health of the population as vital for national development, and that for the individual good health is the most important asset and human right. To reach old age in good health requires the combined efforts of the individual, the community, government and civil society. In addition to the supportive environment provided by government, individuals have the responsibility to maintain a healthy lifestyle. Thus, this priority promotes a focus on both the broader life course and the social relationships inherent in maintaining good health.

To ensure the societal and particularly individual adjustment to ageing, enabling and supportive environments are required. The third priority is to ensure and sustain such environments. The Plan recognizes the need to build intergenerational solidarity in the family, community and institutions. The Plan promotes greater access to both the physical environment and to services and resources, including care and social protection. And, finally, the Plan recommends enhancing positive perceptions of ageing in order to influence public values relating to social, cultural and economic exchanges between generations and to eliminate and prevent all forms of elder abuse. Policies and practices should be designed to encourage collaborative partnerships of governments and civil society in this area.

Road map for implementation of the Madrid International Plan of Action on Ageing

The road map sets out a practical framework for implementation of the Madrid International Plan of Action on Ageing. The framework will assist countries to elaborate strategies for the implementation of the Madrid Plan of Action at the national level by helping them to set national priorities and select approaches. Simultaneously, the road map strives to stimulate international cooperation to assist Member States in their implementation efforts.

The road map takes into consideration the recommendations of the Plan for national action for its implementation and follow-up; it also incorporates the priorities for international cooperation on ageing formulated in the Plan. It is designed with the understanding that implementation of the Madrid Plan of Action is neither a linear nor a simultaneous process: the speed and direction of action are expected to vary between and within nations. Yet two universal and essential facets of the implementation process, particularly in developing countries and countries with economies in transition, may be identified: national capacity-building and mainstreaming of ageing into the national developmental agenda. The two facets are interlinked and interdependent.

The implementation of the Madrid Plan of Action is an evolving process. The strategy for its implementation should also evolve as a result of implementation activities and experience and ongoing communications between all relevant international and national actors. The role of the Department of Economic and Social Affairs Programme on Ageing, as the United Nations focal

point on ageing, is to facilitate the evolving project of the road map through networking within and outside the United Nations system.

National action

The Madrid Plan of Action states that its implementation will require sustained action at all levels. The national level is where the success or failure of the implementation process will be determined, and the Plan of Action emphasizes the importance of national capacity-building for successful implementation. The international community has learned with other mainstreaming initiatives, the most notable being gender mainstreaming, that without capacity-building, mainstreaming is unlikely to happen following the adoption of a plan of action.

National development goals will not be reached when a fast growing segment of the population remains excluded from the process of development. Therefore, in order to support Member States in their implementation efforts, particularly in promoting and mainstreaming ageing into national development frameworks and poverty eradication strategies, the Department of Economic and Social Affairs is implementing a programme of assistance. One facet of the programme is the convening of national workshops that offer Member States the opportunity to focus on their implementation priorities within the context of the Plan, assess their implementation needs and available infrastructure and identify resources. During these workshops, several issues are explored and addressed within the national implementation process, including:

- Benefits of and obstacles to mainstreaming issues of ageing into national development agenda;
- Role of national focal points and mechanisms on ageing in the development of national policy;
- Status of national age and sex-disaggregated data collection and analytical analysis as the basis for successful mainstreaming. The task here is to pinpoint age and gender-based exclusion and inequality in order to influence policy design, monitoring and evaluation;
- Participation of older persons in the processes of formulation, implementation and monitoring of the development agenda;
- Building and adjusting organizational capacity in order to achieve the understanding, commitment and capacity of staff to undertake age-sensitive analysis and initiatives.

International action

The Madrid Plan of Action established that the challenges of an ageing society must also be addressed through global development agendas and that policy responses to ageing must be mainstreamed in cross-sectoral policies, programmes, objectives and priorities at the international level. According to the Plan, mainstreaming ageing into global agendas is essential and requires that ageing be linked to other frameworks for social and economic development and human rights.

Mainstreaming ageing at the global level requires a systematic process and strategy to incorporate ageing into all facets of development programmes and policies. It requires different thinking about respective mandates and institutional frameworks, and reduction of compartmentalization.

A crucial starting point would be to incorporate ageing in the elaboration of United Nations Common Country Assessments and subsequent Development Assistance Frameworks at the country level. Mainstreaming should not create separate or new programmes where implementation becomes hindered by lack of resources. Rather, it should integrate ageing into existing processes and work programmes of the United Nations system organizations and development budgets and include older persons in policy implementation and evaluation as a matter of course.

Strategic plans and policies specifically targeted to older persons are still critical, but not enough to address the global reach of the ageing issue. Successful adjustment to an ageing society should not merely address the linear ascent into old age but should promote broad-scale adjustments throughout life and across social, economic and political institutions. Ageing needs to be linked to global agendas on poverty to include older poor people; on children and youth to include intergenerational issues; on the advancement of women to include older women; on rural development to include issues of ageing in rural and remote areas; and on HIV/AIDS to include its impact on older persons and to recognize the vital contribution of older persons in keeping families and communities together in the face of HIV/AIDS.

The link between ageing and poverty has been neglected in the global debate on poverty reduction strategies owing to the lack of hard statistical evidence on poverty levels of older persons and knowledge about the intergenerational transmission of poverty. This neglect is most evident in the case of the Poverty Reduction Strategy Papers (PRSPs), formulated by Governments in association with the Bretton Woods institutions, and in relation to the poverty-reduction targets and social and economic development objectives contained in the Millennium Development Goals. As societies age, integrating ageing into internationally agreed outcomes would help institutions to keep pace with the changes induced by demographic trends. It is important to start with the action programmes of the Goals and to integrate ageing and other social groups into procedures governing the PRSPs so that the potential of pro-poor policies are realized to the fullest.

The global actions to achieve the Millennium Development Goals and implement PRSPs are providing opportunities for the involvement of all sectors of civil society and Government. An incremental approach may best incorporate ageing by setting achievable, practical targets that utilize existing data to establish policy now, rather than waiting for later when the data finally convinces policy makers of the urgency of the issue. Nonetheless, the lack of age-disaggregated data in many countries remains a serious hindrance to policy formulation and development.

Modalities for review and appraisal

The Commission for Social Development was designated as the intergovernmental body responsible for periodic review and appraisal of the implementation of the Madrid International Plan of Action on Ageing. At its 41st session in 2003, the Commission agreed to establish a “bottom-up approach” to review and appraisal.

The bottom-up approach is defined as an open-ended, participatory process that seeks to incorporate and link local and national activities to UN regional intergovernmental bodies and global processes of review and appraisal. A bottom-up participatory approach is expected to offer Governments several advantages, including broadening the sources of information available to policy makers by complementing statistical and other data with qualitative information; the provision of policy relevant information when statistics or other data do not exist and cannot be gathered on short notice; the establishment of priorities for policies and programmes that reflect

peoples' interests; monitoring and evaluation of the implementation of policies and programmes and re-orientation of them if needed; and an opportunity for people, particularly those who are excluded or marginalized, to articulate their conditions and their needs. In 2004, the Commission decided to undertake the review and appraisal every five years, with each cycle to focus on one of the priorities identified in the Madrid Plan of Action.

The review and appraisal process should start by raising awareness at national and local levels about the Second World Assembly on Ageing and the recommendations of the Madrid Plan of Action. In order for people to be able to participate in a review and appraisal activity, they must first be informed of the content of the Plan of Action. The ultimate goal of this initial stage, therefore, is to inform older persons, as "primary" stakeholders, of their rights, responsibilities and opportunities as defined in the Madrid Plan, and establish a notion of local ownership of its implementation and follow-up. Mobilization through provision of information, education and communication activities can help older persons to understand that they have a critical role in the bottom-up approach.

Gathering relevant information is the core of review and appraisal. The essence of the participatory method is to listen to stakeholders and give them a chance to state their views at different stages of the process. This allows a different type of information to emerge, which may be more *qualitative* in nature, to complement *quantitative* monitoring. Given the heterogeneity of issues related to ageing and corresponding policy responses, entry points of information for evaluation the Madrid Plan have to be multitudinous and not confined to a single method. Gathering of *primary* information will be undertaken at the local level (community, village, district). Information could be collected within regular *focus groups* consisting of older persons, frontline service workers, service user groups, family caregivers, older volunteers and other informants on how well policies have been realized. Periodic feedback to a national body is necessary so that the review and appraisal can occur at the national level. *Watch dog groups*, such as district coordinating committees, could be established to review the impact of different policies and programmes on older persons. A *group monitoring* process can be organized, taking advantage of existing community groups or organizations, and involving persons of all ages. *Mini surveys* based on representative samples could also bring interesting local findings to light.

It is important that the "distillation" of gathered information occur at all levels of the process. Normally, verification of findings has to be undertaken *in situ*, particularly since locally detected issues require local clarifications. At the same time, the distillation needs to be coordinated so as not to discount the heterogeneity of older population and the diversity of the information gathered. In order to achieve this, partnerships involving major stakeholders are required to collate the information and provide it to the appropriate channels. Information, once analyzed and "distilled", needs to be fed simultaneously back down to the community and up to the national level.

The national level of review and appraisal is where the findings must be translated into recommendations for improving policy and programme design in order to promote better implementation of the Madrid Plan of Action in local and national contexts. The process of review and appraisal should be facilitated at the top government level and supported by national legislation. The role of Government is crucial for ensuring sustainability and continuity of the appraisal process, including through provision of financial assistance to the local level.

Conclusion

Demographers note that if current trends in ageing continue as predicted, a demographic revolution, wherein the proportions of the young and the old will undergo a historic crossover, will be felt in just three generations. Globally, the proportion of persons aged 60 and over is expected to double between 2006 and 2050, from 11 to 22 percent, whereas the proportion of children younger than 15 years is projected to drop by a third, from 30 to 20 percent. In certain developed countries and countries with economies in transition, the number of older persons already exceeds the number of children and birth rates have fallen below replacement levels. In some developed countries, the number of older persons will be more than twice that of children by 2050. Developing countries are also projected to age swiftly in the first half of the twenty-first century, as the proportion of older persons rises, on average, from 8 to 20 percent between 2006 and 2050 and the proportion of children will fall from 33 to 21 percent. This portrait of change in the world's population parallels the magnitude of the industrial revolution - traditionally considered the most significant social and economic breakthrough in the history of humankind since the Neolithic period. It marked the beginning of a sustained movement towards modern economic growth in much the same way that globalization is today marking an unprecedented and sustained movement toward a "global culture". The demographic revolution, it is envisaged, will be at least as powerful.

“...Population ageing is a universal force that has the power to shape the future as much as globalization” – Madrid International Plan of Action on Ageing.

The power of ageing is real and rising. The Madrid Plan of Action calls us to embrace the potential of the ageing population as a basis for future development at the global scale. The Secretary-General noted in Madrid: “Ageing is definitely no longer just a ‘first world’ issue. What was a footnote in the twentieth century is on its way to becoming a dominant theme in the twenty-first century.”

Sources

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