REGIONAL WORKSHOP
ON
AGEING AND POVERTY
The implications for national poverty policies and achieving the MDGs in
Eastern and Central Africa

Dar es Salaam, United Republic of Tanzania
29-31 October 2003

Report of the Workshop*

United Nations Department of Economic and Social Affairs
Division for Social Policy and Development

in association with
United Republic of Tanzania
and
HelpAge International

*This is a summary of the discussions held at the Regional Workshop. The views contained herein
represent solely those of the participants. The documents and draft record of the proceedings can be
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Introduction

The Workshop on Ageing and Poverty was held at the Golden Tulip Hotel in Dar es Salaam over a three day period, from 29-31 October. It was hosted by the Government of the United Republic of Tanzania and organized by the United Nations Department of Economic and Social Affairs (UNDESA) in association with Help Age International (HAI).

Some 70 participants attended the Workshop, including 25 official government representatives drawn from the planning and finance ministries as well as ministries concerned with social welfare and ageing from 12 countries in Eastern, Central and Southern Africa; Civil Society participants from 11 countries; and representatives of the United Nations Development Programme (UNDP), the World Health Organization (WHO), the United Nations Population Fund (UNFPA), the World Bank and the Department for International Development of the United Kingdom (DFID).

The Workshop was designed to explore the practical links between the agreements made at the Second World Assembly on Ageing in Madrid in 2002 and the poverty related operational programmes of governments of sub-Saharan Africa. The commitments made in Madrid, which are imbedded in the Madrid International Plan of Action on Ageing 2002 (MIPAA), call for Governments to integrate older persons into national and international development frameworks, which includes the Millennium Development Goals (MDGs). Particular reference was made to the importance of including older persons in programmes designed to achieve the MDGs, with special reference to Goal 1 – poverty reduction.

The underlying principle of the Workshop was that the MDGs cannot be achieved unless older persons are full participants in and beneficiaries of MDG-related action programmes - not merely as targets of poverty programmes but also as contributors to their success. The Workshop reviewed the evidence on ageing and poverty across Africa and elsewhere and developed recommendations for governments, international financial institutions, development agencies and civil society for the incorporation of ageing into national poverty strategies, Poverty Reduction Strategy Papers (PRSPs) and the MDGs.
Key issues discussed

In the course of the Workshop, special focus was given to the following issues, which are further elaborated upon in the rest of this section.

- the mechanisms needed to incorporate an ageing-poverty focus in national poverty policies and strategies (PRSPs), which form the basis for MDG action programmes relating to poverty;
- the means by which poverty monitoring systems now actively being developed at the country level in the region can be strengthened by the incorporation of ageing variables into poverty monitoring strategies, PRSP and MDG processes;
- the evidence base on ageing and poverty in sub-Saharan Africa and the requirements of governments to understand the linkages between poverty levels and ageing at national level;
- the mechanisms needed to match national poverty reduction policies and strategies with the explicit needs of older women and men, taking into account participatory processes linked to poverty programmes;
- the development of an advocacy strategy to ensure clear links between programmes and policies on ageing and poverty, and accountability mechanisms inclusive of all ages and categories of poor.

A broad re-evaluation of the way in which poverty reduction strategies are formulated has been increasing in recent years. This is most evident with respect to the PRSPs and in reaching the MDGs in relation to the poverty-reduction targets. Despite the multidimensional understanding of poverty by international organizations and national poverty monitoring processes, older persons – who are often amongst the poorest and most vulnerable of the chronically poor in many countries – still find themselves excluded from concrete actions being developed to improve the lives of the poorest.

Moreover, lack of progress towards achieving the MDGs in association with a rapidly ageing population in most developing countries, indicates that many older adults will be facing deprivation in the future. As has been documented, it is in those developing countries that have high poverty levels where the older population will grow fastest over the next 15 years (by 48% in sub-Saharan Africa compared to 30% in OECD countries). Within the time span set by the MDGs – between now and 2015 – 62 developing countries will see their older population increase by more than half. Some of these countries have made considerable progress, but others face enormous challenges and are unlikely to achieve the MDGs by 2015.

Rapid ageing combined with poverty is a development concern. UNDP, in conducting MDG analyses, has shown that education and health deprivation among older adults slows down progress towards reaching the MDGs, and that in countries with high incidence of poverty, there is considerable prevalence of older adults struggling to survive in poverty. Thus while ageing is not an explicit issue in any of the MDG Goals,
addressing the living conditions of older persons is crucial to effectively and fundamentally reducing poverty and accelerating progress towards the MDGs.1

There is also preliminary evidence that shows in a number of African countries a higher incidence of poverty in households with older adults. Moreover, older households with young dependents are one of the poorest vulnerable groups, whose incidence of poverty is higher than that of all other households.2

Unlike in any other region of the world, older persons in sub-Saharan Africa are especially at risk because its demographic structure is changing in a unique way. In particular, conflicts and HIV/AIDS have increased the probability of early death among prime age adults, thus putting in jeopardy the traditional safety net of family support older persons were expecting to have available to them. The impact of the ageing process, globalization, and changing patterns of migration have further exposed older persons, especially those in the informal economy and agricultural sector, to great risk.

In order to fill the gaps left by these events, alternative policy measures such as broad based social protection measures need to be developed to enable older persons to cope better with the demands on them. The World Bank, for example, has adopted the Social Risk Management Framework (SRM), which aims to reduce risks and vulnerability by assessing the living conditions of older persons and designing appropriate interventions where needed, including non-contributory social pensions for older persons.

The Country studies prepared for the Workshop (which can be accessed at www.un.org/esa/socdev/ageing) provide growing evidence of the ever closer association of older persons and chronic poverty and much insight into the ageing-poverty nexus. In this regard there is growing interest in the impact on individual and household poverty levels of regular income transfers to older people. However, despite findings in various African countries that regular income transfer to older persons has had significant effects on reducing the poverty of older persons, their families and dependents, and had contributed to economic regeneration at the community level, poverty reduction programmes usually do not include this transfer. There is clearly a need to explore inclusion of such transfers in poverty packages and to develop further the economic and social analysis of the impact of income transfer on poverty reduction.

A review of the PRSPs and related programmes of the countries present at the Workshop revealed a lack of focus on vulnerability in PRSP analysis and related PRSP programmes and budgets, in spite of the accumulating evidence of growing vulnerability among the already chronically poor, which include older populations. For example, although vulnerability is tackled to some extent in all the PRSPs of participating countries, specific measures to tackle the issues identified, including expansion of resources for such

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1 Eduardo Zepeda. The MDG agenda: including older persons in anti-poverty strategies. UNDP BDP/Poverty Group, presentation at the Workshop, Tanzania 2003.
measures, are minimal. Ensuring that the benefits of these investments reach the poorest is difficult.

Some analysis of vulnerability is included in all the national poverty plans and policies reviewed. Vulnerable groups are listed variously as the landless poor, orphans, children, child workers, street children, HIV/AIDS sufferers, women, the disabled, food insecure persons, dependent older persons, older person headed households with dependents, older person households with no earning capacity, displaced persons and victims of calamities. Again in all cases mention is made of the need to establish, expand and maintain safety nets for the vulnerable, and intentions are signaled to include the poor in governance issues. But the mechanisms for these processes to take place are undeveloped and the targeting of the poor commands few resources.3

Also noted was the exclusion of the older vulnerable and chronically poor from the consultative and participatory processes that accompany the development and review of poverty programmes. Age-based discrimination, negative attitudes towards old age, and the difficulties that older persons face in exercising their rights were noted as contributory factors to this exclusion. This is due in part to perceptions of dependence of certain categories of people: older persons are not considered as a development resource. Perceptions of them as passive actors in globalization and development policy have helped to shape the very policy processes that exclude them. The contributions older persons make to their families and communities are immense, but they are overlooked and poorly represented to the broader public and to decision makers who control funding and resource allocation.

If poverty related consultation processes are to be meaningful, much more effort is needed and resources must be made available to include older persons and the poorest in general. Even where national poverty programmes have been developed through widespread consultations, it still turned out that the issues identified in the consultations were not linked to budget mechanisms and final poverty programmes failed to target the poorest.

Governments acknowledged that to date there has been limited attention to the older poor in poverty programmes, and vulnerable groups in general needed to be more explicitly treated in plans and strategies to achieve the MDGs. It was agreed that national policies on ageing need to take into account the links between the issues facing older persons and the sectoral policy responses to poverty and deprivation. Further development of national policies on ageing in line with the Africa Union Plan of Action on Ageing, and the process of review and redesign of national poverty programmes was a key opportunity for this to happen. It was also noted that national poverty policies and strategies should take into account the needs of older population groups by re-aligning budgetary resources and putting into place measures to address their needs.

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3 Off the margins: older people, human rights and poverty reduction in Africa in the 21st century
Linking ageing to national poverty policies, the PRSPs and the Millennium Development Goals. HelpAge International background paper for Ageing and Poverty Workshop. Tanzania 2004
Participants acknowledged that whatever benefits are enjoyed by society today are to a large degree derived from the toil and hard work of the older generation, and that everyone has a social and moral responsibility to confront the poverty and deprivation that afflicts older persons. Linking ageing and poverty to national poverty policies, the PRSPs and the MDGs requires special efforts to integrate the emerging evidence on the link between ageing and poverty into poverty reduction strategies and their monitoring mechanisms. Furthermore, building an evidence base is necessary to achieve an equitable distribution of resources and services for all age groups. Ultimately, a shift in thinking was called for to ensure that older women and men are both contributors to poverty reduction, and equal beneficiaries from poverty reduction programmes.

Key conclusions

The presentations from Governments acknowledged that, to date, older persons in poverty have not been targeted or consulted in any systematic way in relation to national poverty and MDG programmes. There was agreement that this should and would change, and that the policy responses to ageing in future poverty processes would be made explicit.

It was agreed that achieving the MIPAA agreements with respect to ageing and poverty will require political will on behalf of governments and a concerted awareness building process in conjunction with all stakeholders, including governments and civil society. Such a process, moreover, should encompass capacity building and evidence gathering so that national responses to poverty eradication can target and include the older poor; develop and improve mechanisms for both policy and action; and employ the necessary budgetary mechanisms linked to poverty reduction and the MDG goals.

The evidence presented from countries in the region suggests that careful budget financing to target the very poor, including the older poor, can both be efficient and equitable. It is important that the older-age and poverty relationship be linked at the international and national level for maximum effectiveness.

The mainstreaming of older persons’ issues into poverty responses is hampered by lack of links between the poverty programmes and sectoral budget programmes – including social services, HIV/AIDS, agriculture and income-generating initiatives. Overall, the chronically poor and acutely vulnerable, many of whom are older persons and specifically older, widowed women, are currently not benefiting from national poverty focused programmes.

Issues from the Ageing and Poverty Workshop that need urgent attention, therefore include:

- Dealing with the “mind set” to accept older persons as contributors to growth at the country level and not just welfare dependents; indeed to accept older persons as partners in development and as positive agents for change;
• Constructing the evidence base for governments to be able to justify and feel confident about increased budgetary allocations to older people;
• Building the political will to facilitate the integration of older persons so they get their fair and equitable share of development benefits;
• Considering the role that different stakeholders have, including older people and donors, in shaping policy options for governments;
• Mainstreaming and ‘joined up’ policy making, i.e., linking ageing to existing policy and operational programming instruments;
• Linking up older people with civil society groups already active in poverty issues and for civil society groups to bring ageing into their thinking and partnerships;
• Following up and creating partnerships in-country to take forward the discussion and agenda.

**Key recommendations**

1. Governments need to ensure that policy responses to the older poor are explicitly integrated into future poverty and development processes, including MDG programmes. Strengthening national capacity and awareness of the rights and priority needs of the older poor is needed. Mechanisms to advance this include responses to ageing in national poverty monitoring systems as well as the development of age sensitive monitoring under MDG and PRSP programmes.

2. Consultations with the older poor, analysis of their poverty situations and appropriate responses to the poverty of the older poor should be made explicit and transparent in future poverty policies and programmes, especially the PRSPs and MDG action programmes. Further analysis of existing household data – disaggregated by age and sex – and research will be required to improve understanding of the poverty profile of older persons.

3. Equitable access of the older poor to social and other services should be monitored by governments and results shared with citizen-based monitoring systems.

4. Current and future national policies on ageing need to be more clearly linked to poverty reduction processes and their budgets. This should include sectoral programmes, strategies and programmes in health, HIV/AIDS, gender, social protection, rural development, conflict and migration, food security, water, environment and sanitation.

5. Resources at national and international levels should be dedicated to increasing the voice and influence of the older poor in national poverty related consultations and budget mechanisms, with the older poor ultimately becoming involved in the design of all poverty related/community level projects that affect them.

6. Consideration should be given to include targeted income transfers to the older poor in poverty programmes. Reviews and impact monitoring are required to track how
income transfers to older persons (such as targeted grants and social pensions) could form an integral part of poverty responses.

7. Political and budgetary support is needed for building institutional capacity, as well as programmes and initiatives, to enhance the productive capacity and potential of older persons. Measures include increased resources for micro-finance and micro-credit schemes for older persons and the removal of discriminatory age-based barriers reflected in legislation and practice.

8. Stronger liaison and links are required between public sector social service ministries, ministries of finance and ministries of planning in order to achieve fuller integration of poor older persons into national poverty reduction strategies.

9. Regular consultation and support to NGOs and civil society organizations that are active and supportive for older persons are required in order to advance a more substantive and integrated support service network for older persons.

10. National budget allocations should increase social expenditures attached to support services and other support systems for the older poor, and monitoring mechanisms should be developed to ensure accountability.

Next steps

Resource allocation

Suggestions were made regarding the development of a pro older persons’ budget, given the need to strengthen budgetary processes and allocative efficiency to ensure that older persons are taken into account in national resource allocation. Improved equity in the public sector can be seen in the changing of resource allocations in the budget in favour of high need groups including older persons.

Steps to achieve this will include:

- Focusing on the mechanics of equity and expenditure of public resource allocation;
- Reviewing the “care economy” and its contribution to employment and growth;
- Focusing on vulnerability and impoverishment;
- Building the political case for increased focus on older persons’ entitlements;
- Enhancing budget scrutiny to ensure that allocations are targeted towards poor older persons;
- Building capacity to ensure that the rights and entitlements of the older poor are promoted and upheld;
- Emphasizing greater analysis of the poverty reducing impact of income transfers and social security responses within poverty reduction programmes.
• Building the evidence base, with disaggregated data based on age and gender

**Capacity building**

Civil society representatives proposed the building of a **Toolkit** to support the integration of issues of age into national poverty related programmes. A Toolkit can assist in the integration of ageing into national poverty policy and programmes. It should be based on **key principles** that can be used and interpreted by different stakeholders, including communities, the family, governments at central and local levels, civil society organizations, older persons and the private sector.

The Toolkit will build on experiences and case studies of collaboration between a range of partners – civil society and government – and older persons consultations around the world. In addition it will build on: participatory community work and the impact of the voices of older persons on pro poor research and policy development; statistical analysis of older persons’ poverty and status; and a review of budgetary mechanisms that are pro-chronic poor and include older persons. Further analysis of issues presented in the Workshop sessions would be helpful and should highlight partnerships; the importance of empowerment as a principle and an outcome; responses to immediate needs; and advancing entitlements and rights.

The Toolkit could be used for advising stakeholders on how best to integrate ageing into national development plans, including sector strategies and poverty reduction instruments; age sensitive MDG programmes and other international development and poverty reduction mechanisms; tools for inclusive social policy development; research and evidence gathering to assist national policy making on ageing and the connection between ageing and poverty programmes; interventions at community level and the structuring of national programmes on ageing.

The Toolkit should have three key principles:

I. **Bring older persons into the center of consultations**

   Inputs from all stakeholders to include:

   • capacity building for literacy, civic education, strengthened PRSP consultations with older persons and related processes;
   • promotion of a partnership approach to improve social services delivery for poor groups;
   • inclusive dialogue on how national budgets are constructed, fiscal decisions made, and the consultative role of older persons in budget determination and allocation processes enhanced;

II. **Understand the situation of older persons in a wider context and recognize the multiple needs of poor groups**

   Features would incorporate:
• issues relating to the complexity of policy development; competing needs and competing voices; very definite guidance required from international institutions and funding mechanisms; and overall inadequate resource availability for older persons;
• responses to ageing vis-à-vis existing programmes dealing with, inter alia, HIV/AIDS, health, water, children, disability, agriculture, infrastructure, governance, conflict and migration;
• integration of analysis on ageing into poverty monitoring systems;
• examination of policy options, their budget implications and impact on overall poverty reduction.

III. Acknowledge the entitlements that older persons have as a poor group but also as citizens, migrants, refugees and bearers of rights.
This includes such issues as:

• promoting equity and inclusive approaches to both poverty reduction and social development;
• developing a human rights framework to protect and claim rights for older persons, building on the MIPAA, which called for the ‘full realization of all human rights and fundamental freedoms of all older persons’;[^4]
• translating MIPAA and other international agreements and goals, including the MDGs, into national legislative frameworks to ensure that the rights of all people, regardless of age and circumstance, are honoured.

[^4]: A/CONF.197/9, para 12 (a)
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