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**Overview report on the second phase  
of the project**

**Mainstreaming Ageing:  
Indicators to Monitor Implementation**

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**MA:IMI**

**European Centre for Social Welfare Policy and Research  
Vienna**

May 2013



EUROPEAN CENTRE  
FOR SOCIAL WELFARE POLICY AND RESEARCH  
AFFILIATED TO THE UNITED NATIONS

• EUROPÄISCHES ZENTRUM  
FÜR WOHLFAHRTSPOLITIK UND SOZIALFORSCHUNG  
IN ZUSAMMENARBEIT MIT DEN VEREINTEN NATIONEN

• CENTRE EUROPÉEN  
DE RECHERCHE EN POLITIQUE SOCIALE  
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## INTRODUCTION

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Compared to other world regions, Europe faces a rapid ageing of its population. Many of the 27 EU member states as well as some Balkan and CIS countries experience the lowest fertility in the world.<sup>1</sup> At the same time, it is also a region where one finds countries with the highest life expectancy worldwide. That said, the UN European region is characterised by great diversity. From a demographic point of view, there are vast differences across countries regarding the pattern as well as the speed of ageing. Countries with a relatively 'young' population today (i.e. the potential EU candidate countries) are expected to report a significant increase in their share of old-age population over a shorter period of time. At the same time, relatively 'older' countries, such as Germany and Italy, will not necessarily witness a stabilization of their number of old-age people in the near future. Most countries will only reach the peak in terms of share of older people in the total population between 2055 and 2065, and many even later. In addition, ageing is markedly different between men and women: women tend to live longer than men, and while the over-representation of women among those aged 65 and older is projected to decrease in the future, women will still outnumber men in older age groups.

While the increase in longevity experienced by UNECE countries is a positive phenomenon and represents an important success story of economic and social development in the UN European region, population ageing has also important consequences for society placing increased pressure on social systems – for example, fiscal consequences through increased pension, health and long-term care costs and social consequences through the burden of additional familial care responsibilities. Another set of challenges faced by social policy relates to the changing social, economic and cultural context. Increased labour market participation of women and changes in patterns of living arrangements, for instance, has profound impacts on the needs of older people and on how these could be met.

Countries of the region also differ in terms of their socio-economic context and their institutional settings. Because of these variations, policy actions, directions and priorities may also differ from one country to another, ageing-related policies included. A great achievement of the Madrid International Plan of Action on Ageing (MIPAA) and its Regional Implementation Strategy (RIS) has been to establish common and agreed-upon policy priorities (commitments) and policy actions in the field of ageing (all UNECE Member States signed to this political commitment). Nevertheless, what has also become clear is the need for an evidence base to monitor policy responses and also to engage key stakeholders to influence formulation and implementation of policies and programmes that can improve the experiences of ageing, the impact towards raising the quality of life of older people and also improving the intertwined financial and social sustainability of public welfare systems in Europe.

Since its start in 2001, a main goal of the European Centre's MA:IMI project has been to provide quantitative evidence by developing indicators and carrying out and fostering data collection and analysis to monitor the implementation of the political goals and objectives as formulated in MIPAA and RIS and to measure progress made in achieving them. This work during the 1<sup>st</sup> phase of the project resulted in a list of 'indicators of achievement', which were developed and prepared in consultation with international experts, and were analysed in the book "Mainstreaming Ageing: Indicators to Monitor

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<sup>1</sup> CIS is the abbreviation used for the Commonwealth of Independent States.

Sustainable Progress” (edited by Bernd Marin and Asghar Zaidi). This tradition has continued in the 2<sup>nd</sup> phase of the MA:IMI project.

The document provides a short overview of the work carried out during the 2<sup>nd</sup> phase of the project over the period 2008-2012. The main area of work had been to develop a comparative set of gender-specific mainstreaming ageing indicators and long-term care indicators. Another important work stream concerns the dissemination of results emerging from the work on indicators. The document also gives the costs associated with this work programme over the period 2008-2012.

## **I. BACKGROUND AND THE FIRST PHASE OF THE MA:IMI PROJECT**

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The European Centre for Social Welfare Policy and Research (European Centre), an inter-governmental organization affiliated to the United Nations, based in Vienna, has been mandated in undertaking various follow-up activities to the so called Madrid International Plan of Action on Ageing (MIPAA) and its Regional Implementation Strategy (RIS) since 2002. This work had been performed in accordance with the broader mandate given to the United Nations regional commissions by the Madrid International Plan, and has been undertaken in collaboration with the United Nations Economic Commission for Europe (UNECE) Secretariat and its Population Ageing Unit (PAU). This formal collaboration between the European Centre and UNECE, originally under the auspices of the Austrian Federal Ministry of Social Security, Generations and Consumer Protection, was laid down in 2004 in form of a “Memorandum of Understanding”.

In accordance with the Memorandum of Understanding and the mandate specified herein, the main goal of the MA:IMI project is to provide scientific and technical assistance to governments in implementation and monitoring of their actions on ageing within the UNECE region (56 Member States) by the following steps:

- To promote an exchange of information, experiences and good practices in ageing-related policies;
- To carry out and foster data collection, research and analysis;
- To maintain a network of organisations, national authorities, NGOs and other concerned bodies and individuals active in the field of ageing; and
- To disseminate results.

In the first phase of the project (the first follow-up and monitoring cycle of the MIPAA and the RIS) in the period between 2003 and 2007/2008, the European Centre

- Established, as required, a separate “Mainstreaming Ageing: Indicators to Monitor Implementation”(MA:IMI) unit within the Centre, with the consent of its Board of Directors. This unit was staffed with two full-time equivalent staff, and in the course of the project various researchers, administrative and technical European Centre staff provided the necessary additional work;
- Provided technical support to the UNECE and helped to review the implementation of the Plan by the UNECE Member States, by a monitoring process based on effective exchange of information, experiences and best practices in the field of policies related to ageing;

- Developed a set of agreed-upon “indicators of achievement” (in particular in the areas of demographic changes, income and wealth, labour market, and social protection and financial sustainability);
- Carried out data collection, research and analyses in co-operation with agencies such as the World Bank, ILO, ISSA, EUROSTAT, OECD etc., with national authorities, NGOs and other concerned bodies.

The funding for the first phase of the work programme came mainly from the Austrian government (in particular from the Ministry of Social Security, Generations and Consumer Protection and the Ministry for Foreign Affairs). While the stipulated work programme would not have been possible without the generous support of the Austrian government as well as that of the Spanish authorities and of UNFPA, the major part of the human resources, operating for the MA:IMI Unit, was provided by the European Centre itself.

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## **II. SECOND PHASE OF THE MA:IMI PROJECT**

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In the Memorandum of Understanding with UNECE, signed in January 2004, in Vienna, it was foreseen that this initiative is initially planned within a time frame of five years of operation. During the fourth year of the initial five-year period, the UNECE together with all stakeholders, including the Government of the Republic of Austria, evaluated the status of the initiative and recommended that it should be renewed. The new Memorandum between UNECE and the European Centre was signed in March 2009 extending the project until February 2014 after which the parties will review the outcomes of the cooperation and decide upon its continuation.

The new Memorandum of Understanding initiated the 2<sup>nd</sup> phase of the MA:IMI project. This continuation of work under the MA:IMI project was foreseen to be particularly important because it was linked with the second review and appraisal cycle of MIPAA and RIS with the period between 2008 and 2012 presenting a last window of opportunity for countries to implement the core measures to live up to the goals, objectives and commitments formulated in 2002.

As a member of the UNECE Working Group on Ageing since 2008, the European Centre has over the past four years provided technical assistance and expertise to UNECE to review the implementation of MIPAA and RIS in UNECE Member States.<sup>2</sup> The principal goal of the review was to evaluate how much progress has been made since 2002, where there is still room for improvement, and how to approach the challenges that still remain. The regional report, prepared by UNECE, was presented in the Ministerial Conference in September 2012, in Vienna.

The European Centre’s MA:IMI team also provided help and information on various methodological and technical issues. One notable example for this was a 2009 data collection exercise covering all 56 UNECE Member countries. It was undertaken by UNECE

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<sup>2</sup> The Working Group on Ageing was established in 2008 with the aim to better integrate country-level expertise on ageing into UNECE work and to ensure that UNECE activities in this field continue to correspond to the needs of member States. The Working Group is an intergovernmental body and a subsidiary of the UNECE Executive Committee and its members include representatives of national authorities dealing with ageing in the UNECE member States, as well as representatives of international governmental and non-governmental organisations.

in collaboration with the European Centre and National Statistical Offices and aimed to update existing statistics and fill in missing data.

In addition, each year, the MA:IMI team prepared an annual report and presented key findings emerging from the MA:IMI project at the Meeting of the UNECE Working Group on Ageing in Geneva.

An overview of work undertaken in the 2<sup>nd</sup> phase of the MA:IMI project is summarised below:

- Prepared annual reports and provided technical assistance to UNECE to help to review and evaluate the implementation of MIPAA/RIS in UNECE Member States.
- Promoted exchange of information among experts, policy-makers and civil society by (co-) organizing and participating in various international conferences, workshops, and expert meetings.
- Developed a comparative set of gender-specific mainstreaming ageing indicators and long-term care indicators, and collected and analysed data for these two sets of indicators.
- Produced a number of publications, including 3 book publications, 2 EU Presidency papers and several policy briefs, conference papers as well as journal articles, and disseminated findings through the website, newsletters, journals and at international conferences and workshops.
- Reorganised and updated the "Monitoring RIS" website.

### III. DETAILED WORK PROGRAMME AND RESULTS OF THE SECOND PHASE

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For the second phase of the project work has been divided into the following five work packages:

- **Work Package I:** This work package reports on the work for the collection of data on ageing-related indicators and the analyses based on these indicators. The work focuses on the analyses of indicators already generated in the 1<sup>st</sup> phase of the project. In addition, and more importantly, the work during the 2<sup>nd</sup> phase is geared towards developing indicators and collecting corresponding data on gender-specific mainstreaming ageing indicators as well as on long-term care indicators.
- **Work Package II:** This work package undertakes further work in updating and improving the MonitoringRIS website. The Knowledge and Information Management and Support Unit (KIMSU) of the European Centre has been a major force behind the website's development, its update and further dissemination steps to make stakeholders aware of the project knowledge on the website.
- **Work Package III:** This package is geared towards organisation of seminars, workshops and international conferences to bring international experts together, and to generate and disseminate scientific work for the MA:IMI project.
- **Work Package IV:** The work in this package focuses on preparing publications on the basis of research and information generated during the project, essentially for the purpose of dissemination of information to a wider group of policy-makers and practitioners.

- **Work Package V:** This work further focuses on the dissemination of information, in particular using the tool of newsletters to disseminate information on major pieces of ageing-related research as well as a synopsis of policy changes that affect older people of the current and future generations.

Information about the work carried out under each of these work packages is presented in this section of the document.

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## WP1. WORK ON INDICATORS

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Establishing a set of gender-specific mainstreaming ageing indicators and a set of long-term care indicators has been selected by Member Countries as the two thematic focuses for the 2nd phase of the European Centre's MA:IMI project. In the period 2008-2012, the European Centre developed a set of gender-specific and long-term care indicators, collected and organized data, carried out methodological and analytical work and published the results. This involved extensive research on national sources and comparisons and reconciliation of/with international data sets. We have utilized as much as possible existing international sources, such as the databases of the UN, UNECE, ILO, WHO, Eurostat, OECD as well as European Commission reports. We have also used micro data from harmonised European surveys, such as the European Union Statistics on Income and Living Conditions (EU-SILC), the Survey of Health Ageing and Retirement (SHARE), the European Social Survey (ESS) and Eurobarometer. The process of the choice of indicators involved consultations with the UNECE Working Group on Ageing and with international experts, and was discussed (with European Commission services, OECD) at a number of European events where first results on the two sets of indicators were presented (see WP3).

Gender-specific indicators have been developed with the aim to monitor the specific measures through which the four main policy objectives set out in Commitment 8 of MIPAA/RIS should be met.<sup>3</sup> In accordance with these objectives, the indicators cover the following themes: (1) gender gap in longevity and life expectancy gains, (2) individual and family life patterns, and gender and family roles, (3) education and gendered labour market participation, (4) conciliation of work and family life, (5) retirement and pensions, and (6) poverty.<sup>4</sup>

The development and collection of indicators on long-term care have focused on five main topics: (1) demography and health, (2) living arrangements of older people and informal care, (3) beneficiaries of formal long-term care (covering both home care and institutional care), (4) expenditure and financing of long-term care, and (5) outcomes and quality.<sup>5</sup> In addition, for the second edition of Facts and Figures, we extended our list of indicators now also covering migrant carers as well as indicators on social connectedness, subjective well-being, and on the income and housing situation of older adults.

Both gender-specific and long-term care indicators have been graphically illustrated in a way that is understandable to non-technical audiences and were published, along with

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<sup>3</sup> The four policy objectives are (1) achieve full gender equality, (2) realize full equality between women and men in their contribution in the economy, (3) ensure gender equality of access to social protection and social security systems, and (4) promote shared responsibilities of women and men within their families.

<sup>4</sup> The full list of gender-specific indicators, together with methodological notes, is presented in Annex 1.

<sup>5</sup> See Annex 2 for the list of long-term care indicators with notes.

the research findings, in three book publications and in a number of policy briefs and papers (see WP4).

Furthermore, in the second phase of the MA:IMI project, we also undertook policy analyses using data already generated during the first phase of the project (see WP4). The work produced so far has resulted in analysing what ageing-specific challenges are currently faced by the UNECE Member States and in providing comparative insights that could be critical for countries to be aware of in designing and implementing policies.

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## **WP2. WEBSITE DEVELOPMENT**

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The MonitoringRIS website has been a central tool of our dissemination strategy. Among others, the website provides access to ageing-related policies and strategies and implementation activities (both at the European and national level), publications and other materials which over the past years, helped to support the follow-up process of MIPAA and RIS in the countries of the UN European region.

In 2008 the MA:IMI team reviewed the website's objectives, target groups and the services offered with respect to the structure, organisation and development of the website. In accordance with this review, we also reviewed our list of clients for this website and how information included in the website could be best obtained. As a result, in 2009 a major reorganisation of the website was undertaken in which we have implemented a number of measures to simplify the structure and communicate the content more effectively. Making the website more user-friendly and spreading more research results in a higher frequency to more Monitoring RIS stakeholders was the overall goal. Following the reorganization of website, and based on the feedback and content suggestions received, in 2010 and 2011 we have continued with our regular bi-monthly website updates.

In 2012, it was agreed by the European Centre and the UNECE Secretariat that the UNECE Working Group on Ageing will review the structure and contents of the website after which a decision will be made on its continuation.

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## **WP3. EVENTS ORGANISATION**

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During the 2<sup>nd</sup> phase of the MA:IMI project, between 2008 and 2012, the European Centre (co) organised four international conferences to generate and disseminate scientific work of the MA:IMI project and that of related projects from other organisations.<sup>6</sup> These conferences, as well as workshops brought together relevant actors and provided networking platforms for NGOs, policy makers, and scientists.

Already in 2008, a high-level expert and policy-makers conference, "Reinventing Retirement: Reshaping Health and Financial Security for the EU 27 and Eastern Europe", (23-24 October 2008, Dürnstein, Austria) was organised and hosted by the European Centre in collaboration with the AARP and the Austrian Federal Ministry of Science and Research. It brought together a range of experts and policymakers from the EU-27 member countries, the UN, the ILO, the World Bank as well as delegations from the AARP

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<sup>6</sup> For an extended list of conferences, workshops and seminars see Annex 1.

and the European Centre, to present and discuss the state of the art of knowledge on the multiple causes and consequences of population ageing in Eastern Europe, and its socio-economic consequences for Western Europe.

In 2009, an international expert workshop on "Monitoring Long-Term Care for the Elderly" has been held in Jerusalem (6-10 September 2009), organized by the European Centre jointly with the Ministry of Social Affairs and Services of the State of Israel. The publication of the European Centre on „Facts & Figures on Long-term Care: Europe and North America" was presented for the first time at the meeting and served as a core background document for the discussion. The workshop, which took place from the 6th till the 10th of September, was complemented with one day of on-site visits of long-term care facilities. The workshop also 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.

Facilitating exchange of information in the field of long-term care was the main goal of the workshop "Long-term care in Europe – discussing trends and relevant issues" (22-23 February, Budapest). Organised by the European Centre in cooperation with the Hungarian Institute For Social Policy and Labour, the workshop addressed and discussed the differences and similarities in trends and issues in long-term care for dependent older people across Europe, in particular focusing on policy developments in Central and Eastern Europe and their relevance for Western European countries.

On 8 March 2010, DREES (*Direction de la recherche, des études, de l'évaluation et des statistiques*), COR (*Conseil d'orientation des retraites*), the OECD and the European Centre jointly organised a workshop on "The Gender Dimension of Retirement" in Paris. The event, which was attended by French Ministry officials and by international experts from Europe and the US, provided a platform for an exchange of views on the topic of gender and retirement, with particular relevance to the French situation, and also served as the venue for presenting the book "Women's Work and Pensions: What is Good, What is Best?" and its main findings for the first time.

The European Centre has also been organising international seminars on ageing-related issues at the European Centre throughout the period of the MA:IMI project. The seminars are organised so as to debate the impact of population ageing, and also discuss policymakers' considerations to ensure the fiscal and social sustainability of pension and social welfare systems. The debates that take place in these seminars highlight what opportunities there are in further reforming these systems in the UNECE member countries and to prepare for future challenges associated with a continued ageing of the population.

In addition, the MA:IMI team has participated at a number of technical workshops which contribute to the capacity development of the national governments and staff of international organisations (such as UNECE and UNDP). At the invitation of the UNECE Statistical Division, Bernd Marin and Eszter Zolyomi from the European Centre participated at the "UNECE Sub-Regional Workshop on Gender Statistics" in Tbilisi, Georgia (27-29 September 2010) and presented on gender-specific mainstreaming ageing indicators.<sup>7</sup> The same year, Asghar Zaidi and Katrin Gasior were invited to present on the topic of social exclusion with respect to the gender dimension at the UNECE

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<sup>7</sup> The workshop was organised by UNECE in cooperation with the National Statistical Office of Georgia and the UNDP and UNIFEM Country Offices.

National Workshop on Gender Statistics in Albania, organised in collaboration with the Institute of Statistics of Albania.

The European Centre's participation at the International Workshops on Community Services for the Elderly (Haifa, Israel) is another example of the good cooperation between the European Centre and UNECE as well as MASHAV (Israel's Agency for International Cooperation Development Ministry of Foreign Affairs), the main organiser and host of the workshops. This year is the third consecutive time that the European Centre has been invited to present key findings from the work on long-term care. In 2011, Frederique Hoffmann made a presentation on informal care, based on the results of the first edition of "Facts and Figures on Long-term Care", while selected issues from the second long-term care book "Facts and Figures on Healthy Ageing and Long-term care" were presented for the first time in the 2012 workshop.

Finally, a key event in 2012 had been the UNECE Ministerial Conference on Ageing in Vienna, hosted by the Austrian Government, where the European Centre was represented by Bernd Marin, who was one of the keynote speakers of the Conference, and Asghar Zaidi, organiser and keynote speaker of the Research Forum of the Ministerial Conference.

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#### **WP4. SCIENTIFIC PUBLICATIONS**

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The book publication "Facts and Figures on Long Term Care: Europe and North America", published in 2009, was the first major outcome of the work on long-term care indicators.<sup>8</sup> This publication covered 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. The book was accompanied by a publication on the sources and estimation methods used.

The most recent outcome of our MA:IMI work has been the publication of the "Facts and Figures on Healthy Ageing and Long-term care", prepared jointly with the WHO and completed in November 2012. This second edition of the Facts and Figures provides information on the ageing phenomenon across the UNECE region. The contents of the publication has a strong focus on comparative indicators covering data and information on demography, social situation of older people, health, informal care, migrant care workers, public long-term care policies and expenditure for the countries of the UNECE region. The publication is meant as a tool to inform policy debate and decision-making by policy-makers. It provides easily accessible information on data and facts for academic experts and researchers to aid comparative analysis of healthy ageing and long-term care. Set against the backdrop of a number of recent initiatives, namely, the European Year 2012 on Active Ageing and Intergenerational Solidarity and the High level UNECE Ministerial Conference on Ageing which took place in Vienna, Austria (19-20 September 2012), the publication hopes to foster debate and raise awareness of the differences in ageing across the UNECE region and what they entail for citizens. The publication was a joint effort of a group of researchers from the European Centre Vienna (ECV), the *Istituto Nazionale di Ricovero e Cura per Anziani* (INRCA) and WHO Regional Office for Europe. This is also the first MA:IMI book which was published in an e-book format available as free download from the European Centre's website.

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<sup>8</sup> For an extended list of MA:IMI publications see Annex 1.

The book on women and pensions, titled "Women's Work and Pensions: What is Good, What is Best?", is another noteworthy example of the compilation of the scientific work generated in the 2nd phase of the MA:IMI project.<sup>9</sup> Edited by Bernd Marin and Eszter Zolyomi and published in 2010 the book explored 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 it also has a large section on statistical information containing a variety of gender-specific indicators collected and developed in the course of the 2<sup>nd</sup> phase of the MA:IMI project.

Building on collected data from national and international sources and on qualitative information gathered during the 2nd phase of the MA:IMI project, a number of various policy briefs and working papers have been published by the European Centre highlighting the policy challenges faced by ageing societies in the field of long-term care (among others, the 2009 paper "Ageing and Caring Relations within the Family: Intimacy at a Distance?"), old age pensions (i.e. "Fiscal and Pension Sustainability: Present and Future Issues in EU Countries", 2010), disability ("Social Well-being of Disabled Older Persons", 2010), poverty ("Exclusion from Material Resources among Older People in EU Countries: New Evidence on Poverty and Capability Deprivation", 2011) and intergenerational solidarity ("Intergenerational Solidarity: Policy Challenges and Societal Responses", 2010). The papers also seek to identify policy responses as good practices. For instance, the Policy Brief on informal carers ("Informal Carers: Who Takes Care of Them?" 2010) had very much a policy-oriented focus while also taking a comparative perspective, while in another Policy Brief on the financing of long-term care, titled "Paying for Care" (2010), information was presented on the current picture of public and private expenditure on long-term care for older people across countries and also provided first results on potential redistribution effects of home care benefits using SHARE data.

In addition, two EU Presidency papers have been prepared under the MA:IMI project, both written by Asghar Zaidi. The first such paper, "Sustainability and adequacy of pensions in EU countries: A cross-national perspective" (2010), was written for the Belgian EU Presidency and it investigated the outcomes of European pension policies and reforms, both in terms of social (adequate pensions) and financial sustainability of pension systems, as well as the complex interaction between various institutional actors.<sup>10</sup> Throughout the analysis, a special focus was placed on the comparative situation of Belgium. In particular, it assessed how resource-tested and minimum pensions schemes in Belgium fare in comparison to similar schemes in other European countries. What issues are particularly relevant in understanding and analysing gender pension gap in Belgium? How poverty among older people in Belgium compare with the rest of EU member States? How restrictions in early retirement provisions in Belgium compare with the similar pension policy changes in the rest of the EU? Whether coverage of voluntary pension arrangements in Belgium is on the rise and whether such trends in other countries are also observed.

The second paper ("Population Ageing and Intergenerational Solidarity: International Policy Frameworks and European Public Opinion") was prepared for the Cyprus EU Presidency in 2012. The paper addresses the policy challenges that intergenerational

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<sup>9</sup> A summary of the book's key findings were published in the *Soziale Sicherheit CHSS 6/2010: Gender oder Gleichstellung im Wohlfahrtsstaat* in December 2010.

<sup>10</sup> The paper was based upon the presentation of the author to the conference under the Belgian Presidency of the Council of the European Union, "Assuring Adequate Pensions and Social Benefits for All European Citizens", held at Liège, 6-8 September 2010.

solidarity presents, and how societies are responding to them. The discussion covers how international policy agendas highlight the importance of intergenerational solidarity in the context of ageing societies, and what is meant by the term intergenerational solidarity within international policy frameworks (using examples from the UN and the European Commission). The paper also shows the first results from attempts to measuring societal response, by providing the current status of public opinions on intergenerational solidarity challenges across 27 EU countries.

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#### **WP5. NEWSLETTER ALERTS**

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The MA:IMI newsletter alerts, titled “Mainstreaming Ageing - Supporting the UNECE Regional Implementation Strategy for the Madrid International Plan of Action on Ageing” had been running over a three-year period from 2009 to 2011 and had been used for awareness raising amongst the key stakeholders (i.e. UNECE National Focal Points on Ageing, Members of the UNECE Working Group on Ageing, NGOs and Networks active in the field of ageing and other subscribed parties and individuals) reporting on new findings, website updates, new publications, interesting discussions in the international seminars, and on networking activities. These newsletter alerts had been widely disseminated using proven European Centre partner channels.

## ANNEX 1: LIST OF GENDER-SPECIFIC INDICATORS

### I. LIST OF GENDER-SPECIFIC INDICATORS

#### 1. Gender gaps in longevity and life expectancy gains

| Group/Subgroup |           | Definition | Source   | Year   |           |
|----------------|-----------|------------|--|--|-----------|
| <b>GDEM</b>    | Longevity | GDEM1a     | Gender gap in life expectancy at birth and at age 65 | UN life tables,<br>UN World Population Prospects | 1950-2005 |
|                |           | GDEM1b     | Life expectancy gains, by gender                     | UN life tables,<br>UN World Population Prospects | 1950-2005 |

#### 2. Individual and family life patterns, and gender and family roles

| Group/Subgroup |                          | Definition | Source  | Year                                     |  |
|----------------|--------------------------|------------|---|--|--|
| <b>GLIFE</b>   | Individual life patterns | GLIFE1a    | Timing of fertility (% of women having a first live birth by age 25)                | UNECE Family and Fertility Surveys (FFS) | Different birth cohorts from late 1940s onwards to mid 1990s |
|                |                          | GLIFE1b    | The postponement of first marriage and motherhood                                   | UNECE Family and Fertility Surveys (FFS) | 1980-2001  |
|                |                          | GLIFE1c    | Expected ultimate family size by gender   | UNECE Family and Fertility Surveys (FFS) | Different birth cohorts                                      |
|                |                          | GLIFE1d    | Important demographic events that happened to women and men by age 25               | UNECE Family and Fertility Surveys (FFS) | Different birth cohorts                                      |
|                | Family life pattern      | GLIFE2a    | Extramarital births (number of births outside marriage as a % of total live births) | Eurostat                                 | 1960 and 2009  |
|                |                          | GLIFE2b    | Divorce rate  | Eurostat                                 | 1960 and 2009,<br>1960-2009                                  |

|  |  |         |   |                                     |                        |
|--|--|---------|---|-------------------------------------|------------------------|
|  |  | GLIFE2c | Number of lone parent families as a % of families with dependent children | Eurostat, EU-SILC, Whiteford (OECD) | 2003-2007<br>1980-2005 |
|--|--|---------|---|-------------------------------------|------------------------|

### 3. Education and Gendered Labour market participation

| Group/Subgroup         |                        | Definition   | Source  | Year  |                        |
|------------------------|------------------------|--|---|---|------------------------|
| <b>GEDU</b>            | Educational attainment | Tertiary educational graduates (women per 100 men)       | UNECE Gender Statistics Database,   | 1980-2008   |                        |
|                        |                        |  | Eurostat  | 1998-2007   |                        |
| <b>GLM</b>             | Participation          | GLM1a  | Full-time equivalent employment rate, by gender   | Eurostat, LFS; UNECE Gender Statistics Database, ILO  | 1999-2009              |
|                        |                        | GLM1b  | Gender employment gap by age groups   | Eurostat, LFS; UNECE Gender Statistics Database, ILO  | 1980-2007              |
|                        |                        | GLM1c  | Employment rate of women and men by number of children and by age of youngest child                       | UNECE Gender Statistics Database Eurostat, LFS,   | 1980-2007              |
|                        |                        | GLM1d  | Employment gap of women and men with children   | UNECE Gender Statistics Database Eurostat, LFS,   | 1980-2007              |
|                        |                        | GLM1e  | Gender unemployment gap by age groups   | Eurostat, LFS; UNECE Gender Statistics Database, ILO  | 1980-2007              |
|                        |                        | GLM1f  | Average actual and usual weekly working hours of employed persons, by gender (full-time and part-time)    | ILO<br>Eurostat, LFS  | 1999-2008<br>2008-2009 |
|                        | Time use               | GLM2   | Time spent in paid vs. unpaid work activities by gender, age groups, economic activity and household type | UNECE Gender Statistics Database,<br>Eurostat, EU-SILC<br>Harmonised European Time Use Survey | 1980-2008<br>2003-2007 |
| Horizontal segregation | GLM3a                  | Persons employed in private vs. public sector, by gender | UNECE Gender Statistics Database  | 1990-2001   |                        |

|  |                      |       |   |  |                         |
|--|----------------------|-------|---|--|-------------------------|
|  |                      | GLM3b | Employment by sector of activity, by gender                                   | UNECE Gender Statistics Database   | 1990-2006               |
|  | Vertical segregation | GLM4  | Gender gap in socio-economic power  | Eurostat, LFS; UNECE Gender Statistics Database                            | 1980-2007               |
|  | Earnings gap         | GLM5  | Gender pay gap, and earnings difference by age, occupation, length of service | Eurostat, Structure of Earnings Survey<br>UNECE Gender Statistics Database | 2002, 2006<br>1990-2008 |

#### 4. Conciliation of Work and Family life

| Group/Subgroup |                                    | Definition | Source   | Year  |           |
|----------------|------------------------------------|------------|--|---|-----------|
| <b>CoWF</b>    | Work flexibility                   | CoWF1a     | Part-time employment, by gender and age groups (voluntary/involuntary) | Eurostat, LFS<br>UNECE Gender Statistics Database                   | 1980-2009 |
|                |                                    | CoWF1b     | Temporary employment, by gender and age groups                         | Eurostat, LFS   | 1998-2009 |
|                |                                    | CoWF1c     | Remuneration of special leave days                                     | Eurostat, LFS, Ad-hoc modules                                       | 2005      |
|                | Parental leave and benefit payment | CoWF2a     | Length of parental leave (paid / unpaid)                               | International Review of Leave Policies, 2008                        | 2008      |
|                |                                    | CoWF2b     | Parental benefit in % of AW (net benefit as a % of net earning)        | International Review of Leave Policies, 2008                        | 2008      |
|                |                                    | CoWF2c     | Paternity leave (length and benefit )                                  | International Review of Leave Policies, 2008                        | 2008      |
|                |                                    | CoWF2d     | Parental benefit (individual / family right)                           | International Review of Leave Policies, 2008, MISSOC Database, 2008 | 2008      |
|                |                                    | CoWF2e     | Parental leave flexibility   | International Review of Leave Policies, 2008, MISSOC Database, 2008 | 2008      |

|        |           |   |                                 |                        |           |
|--------|-----------|---|---------------------------------|------------------------|-----------|
|        | Childcare | CoWF3a  | Main type of childcare used     | Eurostat, EU-SILC 2006 | 2005-2007 |
| CoWF3b |           | Children in formal childcare by age and duration                        | Eurostat, EU-SILC 2006          | 2005-2007              |           |
| CoWF3c |           | Availability of childcare (number of kindergartens, public and private) | National Administrative Sources |                        |           |

## 5. Retirement and Pensions

| Group/Subgroup |                         | Definition | Source  | Year                            |             |
|----------------|-------------------------|------------|---|---------------------------------|-------------|
| <b>GPEN</b>    | Retirement and Pensions | GPEN1a     | Actual retirement and seniority by gender   | SPC Report (2006, 2009)         | 2006, 2009  |
|                |                         | GPEN1b     | Main reasons for retirement, by gender  | Eurostat, LFS, Ad-hoc module    | 2006        |
|                |                         | GPEN1c     | Early/late retirement, by gender  | National Administrative Sources | Latest year |
|                |                         | GPEN1d     | Average service time of new old age pensioners by gender  | National Administrative Sources | Latest year |
|                |                         | GPEN1e     | Net theoretical pension replacement rates for women, by number of years out of labour market due to childcare | SPC Report (2009)               | 2009        |
|                |                         | GPEN1d     | Pension credits   | OECD, MISSOC, National sources  | Latest year |

## 6. Poverty and material deprivation

| Group/Subgroup |                                  | Definition | Source                                       | Year              |           |
|----------------|----------------------------------|------------|--|-------------------|-----------|
| <b>GPOV</b>    | Poverty and material deprivation | GPOV1a     | Gender gap, by age groups and household type | Eurostat, EU-SILC | 2003-2007 |
|                |                                  | GPOV1b     | Gender gap, by age and household type        | Eurostat, EU-SILC | 2003-2007 |

## II. METHODOLOGICAL NOTES

### 1. Gender gaps in longevity and life expectancy gains (GDEM)

GDEM1a - Gender gap in life expectancy at birth and at age 65

Expressed as the difference between male and female life expectancy in number of years.

Life expectancy (UN Definition): The average number of years of life expected by a hypothetical cohort of individuals who would be subject during all their lives to the mortality rates of a given period. It is expressed as years.

GDEM1b - Life expectancy gains, by gender

Additional number of years/days gained within a given period (i.e. between 1950 and 2005).

### 2. Individual and family life patterns, and gender and family roles (GLIFE)

GLIFE1a - Timing of fertility

Cohort-specific fertility rates. Percentage of women having a first live birth by age 25.

GLIFE1b - The postponement of first marriage and motherhood

Change of mean age at first marriage and mean age of women at the birth of the first child in years within a given period.

GLIFE1c - Expected ultimate family size by gender

Average number of children ultimately expected by women and men aged 20-24 with no children.

GLIFE1d - Important demographic events, by gender

Summary measures for selected life events. Percentage of women and men who have completed:

- their 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.

GLIFE2a - Extramarital births

Number of births outside marriage as a percentage of total live births.

GLIFE2b - Divorce rates

i) Crude divorce rate. Measured as the ratio of the number of divorces during the year to the average population in that year (expressed per 1000 inhabitants) – (Eurostat definition);

ii) The number of divorces per 100 marriages.

GLIFE2c - Lone parent families

Number of lone parent families as the percentage of families with dependent children.

### **3. Education and Gendered Labour market participation (GEDU and GLM)**

GEDU - Tertiary educational graduates

Number of women who completed their tertiary education (women per 100 men).

GLM1a - Full-time equivalent (FTE) employment rate, by gender

The full-time equivalent employment rate is calculated by dividing the full-time equivalent employment by the total population in the 15–64 age group. Full-time equivalent employment is defined as total hours worked on both main and second job divided by the average annual number of hours worked in full-time jobs.

GLM1b - Gender employment gap by age groups

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

GLM1c - Employment rate of women and men by number of children and by age of youngest child

GLM1d - Employment gap of women and men with children

Measured by the difference in employment rates between women/men with no children and women/men with 2 children/with a child below age 6, in percentage points.

GLM1e - Gender unemployment gap by age groups

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

GLM1f - Average actual and usual weekly working hours worked in main and second jobs, by gender

The number of hours actually/usually worked during the reference week includes all hours including extra hours, either paid or unpaid, but excludes the travel time between home and the place of work as well as the main meal breaks (Eurostat definition).

GLM2 - Time spent in paid vs. unpaid work activities, by gender and age groups

The indicator reports how the average daily time is allocated among the following activities: child care, paid work and unpaid work for different typologies of working households with children: men in full time work, women in full time, part time work and mainly at home.

GLM3a - Persons employed in private vs. public sector, by gender

This indicator is to measure horizontal gender segregation in the labour market.

GLM3b - Employment by sector of activity, by gender

This indicator is to measure horizontal gender segregation in the labour market.

GLM4 - Gender gap in socio-economic power

Measured by the share of women among legislators, senior officials and managers (as covered by ISCO category 1).

GLM5 - Gender pay gap

Measured by the ratio of women's gross hourly earnings to men's for paid employees at work at least 15 hours (Eurostat definition). This indicator aims to capture the difference between men and women's overall position in the labour market. Since this indicator does not account for differences between men and women regarding the type of activity, occupation, or length of service, this can be complemented by data from the Eurostat Structure of Earnings Survey.

#### **4. Conciliation of Work and Family life (CoWF)**

CoWF1a - Part-time employment, by gender and age groups

Part-time employment in total employment: number of part-time employed as a share of total employment.

i) voluntary/involuntary part-time employment

Persons working on an involuntary part-time basis are those who declare that they work part-time because they are unable to find full-time work (Eurostat definition).

CoWF1b - Temporary employment, by gender

Number of employees with contracts of limited duration as a share of total employees.

CoWF1c - Remuneration of special leave days

Special leave days from work are remunerated, not at all remunerated or other arrangements used.

CoWF2a - Length of parental leave

Length of paid and unpaid parental leave.

CoWF2b - Parental benefit

Replacement rate of statutory parental leave schemes for an Average Worker (AW). Net benefit as a percentage of net earning.

Average Worker (AW): average wage of a full-time worker in industries and services (NACE C-K).

CoWF2c - Paternity leave

Length and payment of paternity leave.

CoWF2d - Parental benefit right

Parental leave as an individual and/or family right.

CoWF2e - Parental leave flexibility

i) Reduced hours available to work while on parental leave in first year and later;

ii) Flexible options:

- Leave can be taken full- or part-time
- Leave can be taken in one or several blocks of time
- Leave can be taken for a shorter period with higher benefit payment or for a longer period with lower payment
- Leave can be transferred to non-parent
- Leave can be taken at any time until child reaches a certain age
- Additional leave

iii) Right to request flexible work.

CoWF3a - Main type of childcare used

Type of childcare used by parents (formal or informal).

CoWF3b - Children in formal childcare

Percentage of children aged less than 3 and aged between 3 and compulsory school age in formal childcare over the population of each age group.

CoWF3c - Availability of childcare

Number of formal public and private childcare (day-centres).

## **5. Retirement and Pensions (GPEN)**

GPEN1a - Actual retirement and seniority, by gender

Actual average age of retirement and seniority. Seniority refers to the average number of contributory years and includes non-contributory periods.

GPEN1b - Main reasons for retirement, by gender

This variable aims to get the main factor that made person exit from using categories of responses more adapted/oriented to older workers (aged between 50 and 69 who are already in retirement or early retirement).

1- Job lost (voluntary redundancy not included)

2- Had reached compulsory retirement age (person was forced to exit because of his/her age ((different from the standard retirement age or the minimum retirement age)).

3- Own health or disability

4- Care responsibilities (person had to care for children or dependant persons)

5- Problems related to job (working time patterns, tasks, health and safety, job stress, too demanding, skills not adequate or not valued, employer's attitude)

6- Favourable financial arrangements to leave

7- Preference to stop working other than previous codes (includes preference to stop working for personal or family reasons, persons who did not need to work or preferred not to work. This also includes persons who reached the minimum or standard retirement age (but not the maximum/compulsory), so who could have stayed longer at work but who preferred to stop working)

8- Other

9- Not applicable (not included in the filter)

(Eurostat LFS Ad-hoc module 2006).

GPEN1c - Early/late retirement, by gender

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

GPEN1d - Average service time of new old age pensioners, by gender

GPEN1e - Net theoretical pension replacement rates for women

This indicator shows the pension costs of career breaks for childcare. Calculated as the cumulative difference in net theoretical pension replacement rates for women, average earner who makes a career break for childcare compared with one with a full career (by number of years of childcare).

GPEN1d - Pension credits

Provision and type of pension credits for caring for children and/or elderly family members to compensate for income losses from future retirement benefits.

## **6. Poverty (GPOV)**

GPOV1a -Income poverty Gender gap

The absolute gender gap, measured by the proportion of working age (17-64) and old age (65+) single women under the at-risk -of poverty threshold set at 60% of the national median equivalised disposable income after social transfers minus the proportion of working age (17-64) and old age (65+) single men under the poverty threshold.

(Eurostat, Eu-SILC definition)

GPOV1b - Material deprivation Gender gap

The absolute gender gap in the material deprivation rate of working age (17-64) and old age (65+) single women and men. The material deprivation rate is defined as the enforced lack of at least three of the following nine items:

- ability to face unexpected expenses,
- ability to pay for one week annual holiday away from home,
- existence of arrears (mortgage or rent payments, utility bills, or hire purchase installments or other loan payments),
- capacity to have a meal with meat, chicken or fish every second day,
- capacity to keep home adequately warm,
- possession of a washing machine, a colour TV, a telephone or a personal car (4 items)(Eurostat, EU-SILC definition)

## ANNEX 2: LIST OF LONG-TERM CARE INDICATORS

### 1. Demography and Health

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

|  |                         |  |  |                          |
|--|-------------------------|--|--|--------------------------|
|  |                         | Population with severe activity restriction, by gender and age group | Eurostat, EU-SILC  | 2006,<br>(Self-reported) |
|  | Prevalence of Alzheimer | Prevalence rates of dementia, by gender and age group                | Own calculations based on Eurostat and Alzheimer Europe (2006) | 2005                     |
|  | Healthy life years      | Healthy life expectancy  | EHEMU  | 2005                     |

## 2. Living arrangements of older people and informal care

| Group                                      | Definition  | Source   | Notes  |   |
|--|---|--|--|---|
| <b>Living arrangements of older people</b> | Living arrangements of population 60+ by gender and age group | UNDESA/Population Division, Living Arrangement of Older Persons Around the World (2005), Eurostat 1990 and 2001 Census data, National data | 1990s and 2001,<br>Types of living arrangement:<br>-Living as a couple<br>-Living with a child<br>-Living alone<br>-Living with others |   |
|  | Mobility in old age (preferences)                             | Eurobarometer  | 2008,<br>Question 26a  |   |
| <b>Informal care</b>                       | Family care   | Percentage of the population aged 15+ providing informal care to a relative aged 60+, by residence   | Own calculations based on A. Walker (1999)   | 1999,<br>Residence refers to co-residence of carer and care recipient. May in the future be supplemented by SHARE data. |
|  |   | Family carers, by gender and age group   | National sources, OECD (2005), EUROFAMCARE national reports (2004)   | 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  | Mestheneos et al. (2005)   | May in the future be supplemented by SHARE data.  |

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

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

| Group              |                                      | Definition   | Source                             | Notes  |
|--------------------|--------------------------------------|--|------------------------------------|--|
| <b>Formal care</b> | Old-age beneficiaries of formal care | Old-age beneficiaries of formal care services, both at home and in institutions (percentage of old-age population) | OECD HD, NOSOSCO, National sources | 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.<br><br>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) | OECD HD, NOSOSCO, National sources | 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)   | OECD HD, NOSOSCO, National sources | 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)                 | OECD HD, NOSOSCO, National sources | Includes those benefiting from care allowances and attendance allowances.<br><br>For some countries for 1995 to 2007.                                 |
|  | Gender dimension of care                  | Differences in probability of receiving formal care services by gender                             | OECD HD, NOSOSCO, National sources | 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                          | OECD HD, NOSOSCO, National sources | Only for old-age beneficiaries, with breakdown between home and residential care.<br><br>Age-groups considered are usually 65-79 and 80 and older.    |

#### 4. Expenditure and financing of long-term care

| Group                                |                        | Definition  | Source                                      | Notes   |
|--------------------------------------|------------------------|---|---|---|
| <b>Expenditure on long-term care</b> | Expenditure            | Public expenditure on long-term care in percentage of GDP | OECD HD, Eurostat ESSPROS, National sources | 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              | OECD HD, Eurostat ESSPROS, National sources | 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 | National sources, Eurostat, MISSOC, OECD    | 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                       | National sources                            | Available for a limited number of countries.  |
|   | Projection of future expenditure on long-term care | Projected change in public expenditure on long-term care.                               | OECD HD, Eurostat ESSPROS, National sources | Standardization of expenditures based on common age and expenditure structures                                      |
| <b>Private cost-sharing and affordability of care</b> | Private expenditure on long-term care              | Private expenditure on long-term care in percentage of GDP                              | OECD HD, National sources                   | 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, EUROFAMCARE, National sources         | For selected countries and regions within countries.  |

## 5. Outcomes and quality

| Group                  |         | Definition  | Source                 | Notes  |
|------------------------|---------|---|------------------------|--|
| <b>Quality of care</b> | 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. |

## ANNEX 3: LIST OF PUBLICATIONS AND EVENTS

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### Scientific publications

Marin, B. (forthcoming 2013) *Welfare in an Idle Society*

Rodrigues, R., Huber, M. & Lamura, G. (eds.) (2012) *Facts and Figures on Healthy Ageing and Long-term Care* European Centre for Social Welfare Policy and Research: Vienna.

Zaidi, A. (2012) "Population Ageing and Intergenerational Solidarity: International Policy Frameworks and European Public Opinion". Paper prepared for the Cyprus EU Presidency.

Ruppe, G. (2011) "Active Ageing and Prevention in the Context of Long-Term Care: Rethinking Concepts and Practices" *European Centre Policy Brief Series*, Vienna

Zaidi, A. (2011) "Exclusion from Material Resources among Older People in EU Countries: New Evidence on Poverty and Capability Deprivation" *European Centre Policy Brief Series*, Vienna

Rodrigues, R. and Hoffmann, F. (2010) "Informal Carers: Who Takes Care of Them?" *European Centre Policy Brief Series*, Vienna

Rodrigues, R. and Schmidt, A. (2010) "Paying for Long-term Care" *European Centre Policy Brief Series*, Vienna

Rodrigues, R. and Schmidt, A. (2010) "Expenditures for Long-Term Care" *GeroPsych: The Journal of Gerontopsychology and Geriatric Psychiatry* Vol. 23, No. 4, pp 183-193

Marin, B. and Zolyomi, E. (Eds.) (2010) "Women's Work and Pensions: What is Good, What is Best? Designing Gender-Sensitive Arrangements" *Public Policy and Social Welfare Book Series*, Vol 37. Ashgate, UK

Gasior, K. and Zaidi, A. (2010) "Social Well-being of Disabled Older Persons" *European Centre Policy Brief Series*, Vienna

Zaidi, A. (2010) "Sustainability and adequacy of pensions in EU countries: A cross-national perspective". Paper prepared for the Belgian EU Presidency.

Zaidi, A., Gasior, K. and Sidorenko, A. (2010) "Intergenerational Policy: Policy Challenges and Societal Responses" *European Centre Policy Brief Series*, Vienna

Huber, M., Rodrigues, R., Hoffmann, F., Gasior, K., Marin, B. (2009) *Facts and Figures on Long-Term Care: Europe and North America* European Centre for Social Welfare Policy and Research: Vienna.

Rodrigues, R., Hoffmann, F. (2009) "Ageing and Caring Relations within the Family: Intimacy at a Distance?" Paper presented at the International Conference on "The Socio-Economics of Ageing", Lisbon, 30 October 2009

Huber, M. and Rodrigues, R. (2008) "Expenditure on long-term care in Europe". *Geneva Association Newsletter on Health and Ageing*, Vol.18, April 2008, Geneva.

Huber, M. and Rodrigues, R. (2008) "Long-term Care for Older People in Europe: A Slim Silver Lining for the Age d'Or". *AARP International Journal*, Winter 2008, Washington.

Huber, M. and Rodrigues, R. (2008) "A framework for measuring long-term care expenditure in Europe". Paper Prepared for the 30th General Conference of The International Association for Research in Income and Wealth, Portoroz, Slovenia, August 24-30, 2008

Zaidi, A. (2008) "Features and Challenges of Population Ageing: The European Perspective". *European Centre Policy Brief Series*: European Centre Vienna

Marin, B. and Zaidi, A. (2008) "Ageing Trends and Policies in the European Region" in *Regional Dimensions of the Ageing Situation*, UN-DESA, New York, pp 107-133

Zaidi, A. (2008) "Well-being of Older People in Ageing Societies". *Public Policy and Social Welfare* Volume 30. Aldershot (UK): Ashgate / European Centre Vienna

Marin, B. (2008) "Living Longer – Working Longer: Challenges for Education, the Labour Market and Social Protection" in Stuckelberger, A. and Vikat, A. (Eds.) *A Society for All Ages: Challenges and Opportunities*, UN, New York, Geneva, pp 57-75

### **International conferences, workshops**

UNECE Ministerial Conference "Ensuring a society for all ages: promoting quality of life and active ageing", September 2012, Vienna, Austria

International Workshop on Community Services for the Elderly, 5-14 March 2012, Haifa Israel

International Workshop on Ageing: Community Services for the Elderly, 20 February - 3 March 2011, Haifa Israel

UNECE Sub-Regional Workshop on Gender Statistics, 7-8 December 2010, Durrës, Albania

UNECE Sub-Regional Workshop on Gender Statistics, 27-29 September 2010, Tbilisi, Georgia

Assuring Adequate Pensions and Social Benefits for All European Citizens, 6-8 September, 2010, Liège Belgium

Workshop on Long-term care, 16 April 2010, Paris, France

Workshop on Gender Dimension of Retirement, 8 March 2010, Paris, France

Long-term care in Europe - discussing trends and relevant issues, 22 - 23 February 2010, Budapest, Hungary

16<sup>th</sup> Regional Conference on "The Demographic Ageing under the Shadow of Economic Crisis: Employment – Human Resources – Retirement", 8 December 2009, Nicosia, Cyprus

Ageing, the Crisis and their Consequences for Fiscal Sustainability in Austria, 4 December 2009, Vienna, Austria

Workshop on "Care Dependence Policy in European Perspective – Selected Issues", 3 December 2009, Bratislava, Slovakia

"Monitoring Long-term Care for the Elderly", 9-10 September 2009, Jerusalem, Israel

International Conference on "The Socio-Economics of Ageing", 30 October 2009, Lisbon, Portugal

High-level conference on Reinventing Retirement: Reshaping Health and Financial Security for the EU 27 and Eastern Europe, 23-24 October 2008, Dürnstein, Austria

30th General Conference of the International Association of Research in Income and Wealth 24-30 August 2008, Portoroz, Slovenia

Side Event at the United Nations, 46th session of the Commission for Social Development 6-15 February 2008 New York, USA

AARP (formerly the American Association of Retired Persons) / UN Briefing Series on Global Ageing 5-7 February 2008, New York, USA

### **European Centre Vienna International seminar series**

Dimiter Philipov, Anne Goujon, Paola Di Giulio: Ageing Dynamics of a Human-Capital-Specific Population: The Case of Italy, 24 January 2013

Roland Sigg: From Ageing as a Crisis to a Long-Life Society: The Evolving Ageing and Longevity Paradigm and Impact on Policies, 19 November 2012

Ariela Lowenstein: Generational Intelligence, 21 September 2012

Rocio Fernandez-Ballesteros: Active ageing. Conceptual and Methodological Issues, 7 September 2011

Robert Holzmann: Portability of Pension, Health, and other Social Benefits: Facts, Concepts, Issues 29 June 2010

Agota Scharle: Child-care provision and maternal employment - lessons from Hungary, 18 September 2009

Pieter Vanhuyse: Elderly Bias, New Social Risks, and Spending Priorities: Investigating Change and Timing in Eight Programs across Four Worlds of Welfare, 1980-2003, 22 July 2009

Achim Goerres: The Political Participation of Older People in Europe: The Greying of Our Democracies, 8 October 2008

Markus Tepe: Traveling without Moving? Pension regime change in ageing welfare states, 3 October 2008

Herwig Immervoll: Gender Inequalities and the Allocation of Market Work within Households, 3 July 2008

### **Meetings of the UNECE Working Group on Ageing**

1st Meeting of Working Group on Ageing 1-2 December 2008, Geneva

1st Meeting of the Bureau of the Working Group on Ageing 11 - 12 May 2009, Bratislava

2nd Meeting of Working Group on Ageing 23 - 24 November 2009, Geneva

2nd Meeting of the Bureau of the Working Group on Ageing 27 - 28 May 2010, Sliema

3rd Meeting of Working Group on Ageing 22 - 23 November 2010, Geneva

3rd Meeting of the Bureau of the Working Group on Ageing 24 - 25 March 2011, Madrid

4th Meeting of Working Group on Ageing 21 - 22 November 2011, Geneva

4th Meeting of the Bureau of the Working Group on Ageing 22 - 23 March 2012, Brussels

5th Meeting of the Working Group on Ageing 22 - 23 November 2012, Geneva

## ANNEX 4: FINANCIAL REPORT FOR THE SECOND PHASE

**Table 1: Direct Costs of Tasks Undertaken during the 2<sup>nd</sup> Five Year MIPAA and RIS Review and Appraisal Cycle by the MA:IMI Project 2008 – 2012**

| Work Package   | Direct Costs in Euro<br>Period 2008-2012 |
|--|--|
| <b>I. Work on Indicators</b>   |  |
| Foster data collection, research and analysis                          | 295,600                                  |
| Total WP-I   | 295,600                                  |
| <b>II. Website Development</b>   |  |
| 2.1 Reorganisation of the website                                      | 26,300                                   |
| 2.2 Maintenance of the website   | 20,800                                   |
| Total WP-II  | 47,100                                   |
| <b>III. Events Organisation</b>  |  |
| 3.1 Co-organisation of international conferences                       | 33,400                                   |
| 3.2 Participation at technical workshops / seminars/<br>conferences    | 3,600                                    |
| 3.3 Annual reporting to UNECE  | 11,300                                   |
| Total WP-III   | 48,300                                   |
| <b>IV. Publications</b>  |  |
| Publication of Policy Briefs, working papers, and reports and<br>books | 193,400                                  |
| Total WP-IV  | 193,400                                  |
| <b>V. Newsletter Alerts</b>  |  |
| Newsletter Alerts  | 12,400                                   |
| Total WP-V   | 12,400                                   |
| <b>TOTAL DIRECT COST</b>   | <b>596,800</b>                           |

| Country / Organisation                       | Contribution in Euro<br>Period 2008-2012 |
|--|--|
| Switzerland                                  | 222,800                                  |
| France                                       | 150,000                                  |
| Belgium                                      | 66,700                                   |
| UNECE / European Commission                  | 56,600                                   |
| World Health Organisation                    | 14,200                                   |
| Cyprus                                       | 14,000                                   |
| Austria                                      | 10,000                                   |
| Luxembourg                                   | 10,000                                   |
| Contribution in kind (Hungary, Israel)       |  |
| <b>TOTAL CONTRIBUTION RECEIVED BY DONORS</b> | <b>544,000</b>                           |