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REPORT OF THE FIFTH MEETING
OF THE EXPERT GROUP ON THE ACTIVE AGEING INDEX

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I.   Organisation and attendance

The fifth meeting of the Expert Group on the Active Ageing Index (AAI) took place on 12–13 October 2015 in Brussels. It was jointly organized by the European Commission's Directorate-General for Employment, Social Affairs and Inclusion and the United Nations Economic Commission for Europe (UNECE).

The meeting was attended by 21 participants, of which 18 members of the Expert Group.[1]

II.   Objective

The meeting aimed at reviewing achievements of and the lessons learned from the second phase of the project (AAI-II), as well as at discussing with the experts the potential tasks under the planned third phase of the project.[2] The latter is being negotiated between the partners and is planned to start in 2016 and last for three years.

In particular the experts were asked to provide their feedback and opinion on:

- Tasks for the third phase of the project, including
  — Further analysis: age cohort analysis, urban/rural, others
  — Further geographical extension and subnational application
  — Fine-tuning of the methodology
  — Promoting AAI and communication strategies
- Best ways of presenting AAI
- Ways to improve interpretation of AAI results, including the question of goalposts
- Usage of proxies and alternative data sources and their selection
- Analysis of sensitivity of the AAI scores to population age structure

III.   Brief summary and overview of decisions[3]

At this last Expert group meeting within the second phase of the project the project team reported on the implemented tasks and asked for the feedback from the experts on what they think worked well, what did not, and what the lessons learned are that can be used for further work under a planned third phase of the project. The project team also presented the possible tasks for the next phase to begin in 2016 and last for three years. The main areas of activities of the second phase, namely research, outreach to stakeholders, and communication are to be kept under the third phase as well.

The research will continue in order to extend geographical coverage of AAI to more non-EU countries. At the same time the work will continue to facilitate the calculation and promote the use of AAI at subnational level where the ageing policies are most often implemented. Both of these tasks require clear methodological guidelines that would explain what questions the indicators seek to answer, and provide advice on proxy identification and usage. More pilot studies will be run at national and subnational level. Regarding the latter, still under the second phase, which was extended through April 2016, a pilot study at municipal level in Germany will be implemented. This will provide first basis for the guidelines development.

Another direction of research will be calculation of AAI for future years, i.e. 2016 and 2018 AAI to continue trend monitoring, but also looking further back, possibly year 2000. The latter might not be

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possible for the overall AAI, but for certain indicators and domain scores should be manageable. Looking at a longer period would allow for trend analysis in a longer run giving it more credibility, and possibly helping to set more realistic targets.

Useful will be to implement analysis of AAI results by groups of population, grouped by different characteristics such as level of education, type of living area, socio-economic status and others.

The index will be kept stable in terms of the 22 indicators, however a possibility to use alternatives sources will be examined for a number of indicators.

More work on AAI interpretation is to be done. It is important to avoid normative interpretation of the AAI results, and to take into account the context (country, region etc.) when interpreting them. In this regard it is also important to work further on goalposts, since the current ones are more of a way to interpret the results rather than targets.

In terms of outreach it is important to continue promoting AAI among all major stakeholders, but also possibly try to reach out to general audience with concrete examples of how AAI can influence individuals' lives. A number of events are planned to be organised, including national (subregional) seminars, an international seminar in 2017, and a side-event for researchers during the UNECE Ministerial conference in 2017. A wiki-space devoted to AAI will be maintained, and an elaborate visualisation tool for AAI is planned to be developed under the third phase of the project.

The following decisions were made:

Research
- calculate AAI for further years: 2016 and 2018 AAI (based respectively on data from years 2014 and 2016)
- make an attempt to calculate AAI or at least some domain scores for 2000
- extend further geographical coverage
- continue work on making AAI usable at subnational level, including development of guidelines
- run more pilot studies at national and subnational levels
- carry out analyses of AAI results for groups of population, for example, grouped by level of education, type of living area (urban/rural), socio-economic status and others
- continue exploring relation between AAI and GDP per capita, life satisfaction, Gini coefficient, and possibly other measures
- look at correlation of AAI with gender equality measurements; and at correlation between domains

Methodology
- keep the indictors as they are at least till 2018, but look at a possibility to use alternative data sources for some indicators
- prepare clear description of indicators outlining what questions the indicators seek to answer
- the project team and the Expert group should provide feedback for the statistical community on active ageing indicators in terms of timeliness, data gaps etc.

Interpretation
- more efforts are needed to ensure correct interpretation of the AAI results, including
  — AAI should not be perceived as "normative"
  — interpretation should be contextual
- continue working on goalposts that could serve as realistic targets, possibly for groups of countries
- possibly change the name of the current "goalposts" as they are more of a way to interpret AAI results rather than a target

Outreach and promoting use of AAI
- more national (subregional) seminars to be held
- international seminar will be organised in spring or early summer of 2017
- organise a side-event at the UNECE Ministerial conference on ageing in autumn 2017

Communication
- continue working on wiki-space
- look into possibility to develop a comprehensive visualisation tool

Expert Group
- the present experts expressed their willingness to continue to be the members of the Expert Group on AAI in the planned next phase of the project
- Mr. Giovanni Lamura agreed to join the Expert Group
- the project team will send out an email to the current members requesting to confirm their membership for the third phase and asking for the preferable dates for the next Expert group meeting in 2016

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ANNEX 2. AGENDA OF THE FIFTH EXPERT GROUP MEETING

DAY 1: 12 OCTOBER 2015

Chair: Ralf Jacob, European Commission

14:00 – 14:30   **Welcome**
Ralf Jacob, European Commission
Vitalija Gaucaite Wittich, UNECE
incl. **Overview of the implemented tasks under AAI-II phase**
Olga Kharitonova, UNECE

14:30 – 14:45   **Updates on the editorial process**
Asghar Zaidi, University of Southampton

14:45 – 18:30   **Third phase of the project**:

14:45 – 15:00   **Suggested activities for AAI-III**
Ettore Marchetti, European Commission

15:00 – 18:30   *Round table: discussion of the project proposal, suggestions*
(with a 20-minute coffee break at 16:00)
- Further analysis: age cohort analysis, urban/rural, others
- Further geographical extension and subnational application
- Fine-tuning of the methodology
- Promoting AAI and communication strategies

18:30   *Close of day one*

DAY 2: 13 OCTOBER, 2015

Chair: Vitalija Gaucaite Wittich, UNECE

09:00 – 09:15   **Welcome and recap of day 1**
Vitalija Gaucaite Wittich, UNECE

09:15 – 10:30   **Presenting and disseminating the AAI project and results, and a discussion on the most appropriate ways to do it**
Vitalija Gaucaite Wittich at the national seminar on AAI, May 2015, Vilnius
Asghar Zaidi at the UN OEWG, July, New York, July 2015
Olga Kharitonova, at the conference on active ageing, October 2015, Riga
Radek Maly at the Kobe WHO centre, October 2015

10:30 – 10:50   **Updates on the work of the UNECE Taskforce on Ageing-Related Statistics**
Andres Vikat, UNECE

10:50 – 11:10   *Coffee break*

11:10 – 11:50   **AAI in non-EU countries**:
Presentation of the AAI results for Canada, Iceland, Norway, and Switzerland
Asghar Zaidi, University of Southampton

Turkey pilot study: field visit outcomes and an initiative from the Republic of Moldova + event on 18 November 2015 in Geneva
Olga Kharitonova, UNECE

11:50 – 13:00   *Discussion* on suitability of suggested proxies and criteria for proxy selection. Possibility to pursue a study on the suitability of proxies and the reliability of AAI comparison when based on proxies. A scope for using SHARE in AAI

13:00 – 14:00   Lunch

14:00 – 14:20   **Sensitivity of the AAI scores to population age structure**, with a brief introduction by *Ettore Marchetti, European Commission*

14:20 – 16:00   *Discussion*: interpretation of AAI results using recently introduced goalposts and of relationship of AAI with GDP per capita, Gini coefficient and life satisfaction, with a brief introduction by *Asghar Zaidi, University of Southampton*

16:00 – 16:30   **Summary**
                 Ralf Jacob, European Commission
                 Vitalija Gaucaite Wittich, UNECE

16:30   Close of the meeting

ANNEX 3. MINUTES OF THE EXPERT GROUP DISCUSSION

12 OCTOBER (14:00–18:30)

Chair — Mr. Ralf Jacob (European Commission)

The Chair welcomed the participants and opened the meeting.

Mr. Ralf Jacob announced that starting from 1 November 2015 he will move to another position and will no longer be involved in the AAI project. He presented Mr. Radek Maly (European Commission) as his successor in the AAI project team.

The Chair informed the Expert Group about the extension of the current phase through April 2016 in order to implement a pilot study at municipal level (several cities) in Germany. Based on its results the guidelines for usage of proxies for AAI calculation are to be produced within the next phase of the project.

Mr. Jacob informed the participants that the third phase of the project (AAI-III) is being negotiated. It is supposed to start in 2016 and last for three years. The Chair stressed that one of the main objectives of the meeting is to get feedback from the experts on the tasks planned for implementation under the third phase.

Ms. Vitalija Gaucaite Wittich (UNECE) joined in welcoming the participants. She mentioned that the UNECE Working Group on Ageing approved the inclusion of the indicators of the Active Ageing Index as a statistical annex to the national reports on the implementation of the Madrid International Plan of Action on Ageing (MIPAA). The UNECE member States are expected to provide data for three points in time (2005, 2010, 2015 or closest). She mentioned also the continued support from policymakers regarding the use of the active ageing indicators. Ms. Gaucaite Wittich reminded the participants about a workshop on active ageing indicators to be held in November 2015 in Geneva that UNECE is organising (for details see below the minutes of the second day). She shared an idea to organise a research forum devoted to AAI as a side event to the UNECE Ministerial Conference on Ageing to be held in 2017.

Ms. Olga Kharitonova (UNECE) made a brief overview of the tasks under the current **second phase** and the status of their implementation.[4] Majority of tasks is carried out as planned. Two tasks that need to be finalised by the end of the current phase are 1) the AAI extension for four non-EU countries, namely Canada, Iceland, Norway and Switzerland, and 2) the pilot studies for Serbia and Turkey.

Mr. Asghar Zaidi (University of Southampton) presented the current state of the **editorial process** of a book which is being prepared based on the selected papers submitted for the International Seminar "Building an evidence base for active ageing policies: Active Ageing Index and its potential" that took place on 16–17 April 2015 in Brussels. Five editors are on the board (including Mr. Zaidi who is leading the editorial process). The evaluation was made based on five criteria, namely Intellectual basis of the paper; Logic of the analysis; Presentation of findings; Conclusions and policy implications; No further work required on the paper. The authors are to be informed about the results by 23 October 2015. The question of establishing the pricing with the publishing house and avoiding the book being overpriced was discussed. Mr. Zaidi particularly stressed the promptness of the editing process with the book being expected in a year after paper submission. Since it is unlikely that a publisher would accept to give an open access to the papers online, the matter of an extended access is to be discussed with the publishers by the editorial board.

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[4] All the presentations given at the meeting are available from
http://www1.unece.org/stat/platform/display/ageing/Expert+Group+on+Active+Ageing+Index+Wiki

Mr. Ettore Marchetti (European Commission) presented the activities planned for the **third phase** of the AAI project that would build on the achievements of the first two phases. The main activities include:

1. Calculation of 2016 AAI and 2018 AAI and continuation of the trend analysis
2. Further geographical extension
3. Pilot studies of AAI in selected UNECE countries
4. Further methodology fine-tuning
5. Retaining the Expert Group on the Active Ageing Index
6. Holding at least one national seminar a year
7. Organising an international seminar or other activity to involve researchers
8. Organising a side-event on AAI during the UNECE Ministerial conference on ageing in 2017
9. Further communication and promotion of AAI use
10. Visualisation tool

Mr. Marchetti also stressed the necessity to work further on the concept of goalposts, which will need to be adjusted as AAI will be extended to more countries and in time, but also adapted for the use of AAI at a subnational level.

More specific analysis of AAI results is foreseen within the first activity, possibly including the analysis of the impact of the population structure on the AAI results. Under this activity, a possibility to use alternative data sources (if the original data sources cannot be used), particularly the Survey of Health, Ageing and Retirement in Europe (SHARE) is planned to be assessed. The European Commission is currently looking into possibility of support provision to all the member States to run SHARE.

Under the pilot studies (activity 3) it is foreseen to run pilot studies at both national and subnational levels. The usage of proxies is inevitable at a subnational level, and in most cases, in non-EU countries at national level; hence the methodology should be expanded to ensure the proxy use. It is important also to assess the impact of proxy usage on the results. In general the use of proxies allows for more extended use of AAI at national (beyond EU) and subnational levels.

Mr. Marchetti pointed out that the composite indicators often have visualisation tools that help to communicate the information to policymakers. Such tool will be useful for AAI allowing for better visibility and certain flexibility, e.g. by providing a possibility to modify weights.

The Chair opened floor for discussion of the suggested activities.

A question of adding more indicators, or replacing the current ones, was discussed at length. Particularly, Mr. Zaidi suggested integrating more indicators on healthy ageing. Ms. Gaucaite Wittich reminded that this matter had been discussed previously and that it had been decided that the index would only win from being stable and not being revised after each year of calculation. Mr. Andres Vikat (UNECE) stressed the importance of continuation of monitoring using AAI without making changes to it. This was supported by Ms. Luciana Quattrociocchi (ISTAT). It was agreed that while the methodology revisions might take place if needed, the indicators should be kept as they are at least until 2017 (the end of the third cycle of MIPAA review and appraisal); then in 2018 this matter could be discussed again.

Mr. Maly mentioned that there is a project by Eurostat aiming at improving timeliness of the data; by 2017 it is foreseen to ensure that the survey results are available sooner after the end of the survey, (e.g. currently Survey on income and living conditions (SILC) data are available in two years after the survey).

Mr. Zaidi stated that more **guidelines** are needed including clear description of what that or that indicators is aimed to measure. Mr. Jacob remarked that it would be useful to define a minimal set of

indicators that should be collected in case of AAI being calculated for a non-EU country or at a subnational level. Ms. Gaucaite Wittich supported the idea of developing guidance with clear description of indicators to ensure quality when calculating AAI at regional or local level. Ms. Quattrociocchi said that the proxies should be strictly connected to the indicators, which requires the clear explanation of their meaning, and supported the idea of guidelines that would also include suggestions for possible proxies.

Mr. Vikat called for the **provision of feedback** to the statistical community, including Eurostat, from the project team and the expert group regarding data gaps and timeliness and recommendations for improvement.

Ms. Anne Sonnet (OECD) suggested further **retrospective extension** of AAI, starting from 1980s in order to **analyse trends**; she stressed that a four-year period (2008–2012) is not enough to implement analysis, as there had not been many changes. Moreover, it covers only an after-crisis period. Ms. Eszter Zolyomi (European Centre for Social Welfare Policy and Research) supported this idea pointing out that over such a short period it is difficult to see if the trend is significant, to interpret it and to link it to policies. She added that effects of some of the latter could be delayed, e.g. of health policy. Mr. Jacob added that using a longer period would allow for setting more realistic targets. Mr. Zaidi emphasised that the trend analysis even over such a short period provided lots of information. He added that with time there will be fewer issues with comparability. Mr. Zaidi stated that it will not be possible to calculate the whole index for the earlier years given the lack of data, but some domain scores could be calculated. It was agreed to look into calculation of indicators and domain scores to the extent possible for the year 2000. Ms. Sonnet referred to an OECD work on effective retirement ages in the past decades that could be used as a data source for some indicators. She also mentioned that retrospective calculation and analysis can be a topic for research. Mr. Jacob pointed out that for the purposes of national analysis (and not international comparison) the retrospective calculation within a country could be done using the available alternative data.

It was agreed to look into calculation of AAI for a subset of countries using data from SHARE to compare with the original AAI results. This will allow to estimate if SHARE could be potentially used instead of EQLS for international comparison within a subset of countries participating in SHARE.

Breakdown

More research should be encouraged of AAI broken down by various characteristics of population, e.g. living in rural/urban areas, education level, and others. This could be done within the framework of another international seminar devoted to AAI.

Mr. Zaidi named the following options for breakdown: socio-economic status; level of education; health (disability) status. He added that this exercise does not have to be implemented for the whole index, but can be done for domain scores.

Mr. Heribert Engstler (German Centre of Gerontology) raised a question of looking at AAI for migrant population. Mr. Zaidi reminded that there was a paper submitted for the international seminar (by Eralba Cela & Mariteresa Ciommi) devoted to ageing and migration. The issue here is the small sample size with data coming from surveys and not census. There is no survey that would look into ageing (of) migrants at least within the European region. Ms. Gaucaite Wittich mentioned that the Gender and Generation Survey (GGS) had a special sample on Turkish minority in Germany; she also mentioned that Ms. Pearl Dykstra (Rotterdam University) has been working on the subject of Polish migrants in the Netherlands. Mr. Bernd Marin (Webster University Vienna) pointed out that there is less of impact on for receiving countries as opposed to the sending countries (e.g. migrants from Germany to Austria and Switzerland).

Mr. Kenneth Howse (University of Oxford) underlined that in the United Kingdom a very important issue is the one of (reducing) inequality. Mr. Marin suggested looking into a link to countries' internal inequalities. Ms. Jolanta Perek-Bialas (Warsaw School of Economics and Jagiellonian University) suggested including the subject of inequality in the topics for the papers for the next international seminar.

Mr. Bernd Marin (Webster University Vienna) suggested using both measurements: chronological and prospective age when analysing the population age structure (more on age structure in the minutes of the second day, see below).

Interpretation and goalposts

Goalposts that were conceived for better interpretation of the AAI results were discussed. It was noted that the current goalposts are too general — they are the same for all the countries — and cannot be really considered as realistic goals. Developing goalposts for country clusters was suggested by Mr. Zaidi. Clusters could be formed by, for example, gender equality, socio-economic development and others. Mr. Marin suggested looking into perspective of how long it would take to reach that or that target, and based on that set targets.[5]

Mr. Marin suggested looking not at only at the scores but at the distances behind the goalposts, and to assess how long it would take a country to reach a given target; to make analysis of based on the current trend on how much time it will take for a country to achieve a goalpost. Mr. Marin suggested to use projections to push policymakers to take measures, e.g. if achieving a given target could take about 40 years, the steps should be taken to speed up the process. Mr. Marin added that it is important to analyse what dimensions should be improved first to trigger the improvement of the others.

Mr. Giovanni Lamura (INRCA/IRCCS) pointed out the importance of taking into account the differences in value systems of different countries and of not making of AAI a normative tool. Mr. Jacob agreed that the normative interpretation should be avoided and that, in general, the interpretation of the AAI results should be left up to the countries themselves. Mr. Lamura informed about attempts to organise a meeting with regional authorities on cross-regional comparison of AAI results (the results of the research performed by ISTAT), and in this context — very different situations in North and South Italy — stressed once again the need to have a more neutral way of presenting AAI. He also pointed out that ranking could be demotivating and that it is important to contextualise the AAI results. Mr. Zaidi reminded that when the project team presents the AAI results, they would point to what indicators have lower levels and suggest what policies could be implemented to deal with the shortcomings. Ms. Perek-Bialas stated that the ranking could be, on the contrary, motivating and gave an example of the Polish parliament and ministries for whom the 2012 AAI results became a trigger to look into the active ageing situation and work on the legislative framework in the country. This example can be motivating for other countries. Mr. Engstler also pointed out that ranking allows for better visualisation.

Ms. Anne-Sophie Parent (AGE Platform Europe) noted that there is a lack of a tool to trace ageing policies at **local level** where they are implemented. She also pointed out that it would be useful to connect the SEEIT tool to AAI, and both tools can be used at subnational level. Mr. Sergio Murillo Corzo (Biscay Provincial Government) encouraged developing and supporting AAI at regional level.

A matter was raised of **interlinkage** of indicators while analysing the results: it is important not just to look at a single indicator but to analyse it in its linkage to the others, e.g. a link between the level of healthy life expectancy or lifelong learning with the employment rate. Interrelation of the indicators is also important in the context of different policies being developed or/and implemented by different

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[5] The goalposts were further discussed during the second day of the meeting.

authorities (Mr. Koen Vleminckx (FPS Social Security) gave an example of Belgium): by showing that the indicators are linked the interagency cooperation will be encouraged.

Mr. Jacob noted that it could be useful to bring together policymakers from all levels so that they could define who is responsible for what area.

A question of **disaggregation** of AAI and individual indicator analysis for the interpretation of the AAI results was discussed at length. Mr. Jacob said that it is worth to focus on analysis of the impact of each individual indicator on the overall AAI. Mr. Zaidi mentioned that it might be useful to look into individual indicators while analysing trends. Mr. Vikat reminded that the added value of AAI is that it is a composite index which provides a comprehensive picture of active ageing, and warned against shifting to the analysis of each indicator individually, also for the reason that such research already exist. Mr. Jean-Marie Robine (INSERM) supported this, stressing that AAI brings together different dimensions of active ageing. Mr. Jacob agreed that the comprehensive approach should be kept.

Mr. Robine suggested exploring another way of measurement, namely to look into "active days" that would in turn compose an "active year" (like EHLEIS does for healthy days — healthy years). Mr. Marin supported this idea, pointing out also that it is important to look at the difference between proclaimed policies and targets and real implementation in terms of active ageing.

Mr. Engstler suggested looking at the AAI results from the gender perspective as a way of results interpretation. Ms. Parent recalled the "SOPHIE" project that links policies to gender inequalities in health.

Communication and outreach

The question of the target audience of AAI was discussed, particularly the matter of usefulness of reaching out to the general public. It was agreed that although the principal target audience is policymakers, civil society and research community, the general public could be also informed as they could influence the other groups. The outreach could be done by using concrete stories demonstrating what impact AAI had on people's life: what changes were made to local policies, e.g. on healthy living, linking it to the national targets, and stressing the influence people can make to national policies through local communities.

Mr. Zaidi gave an example of the Global AgeWatch Index which has a broad media coverage. Ms. Gaucaite Wittich remarked that well-being of older people (which GAWI measures) sells better, while AAI measures the untapped potential of older people.

Ms. Perek-Bialas pointed out that the policymakers are willing to support research when they are convinced in its utility, and reiterated the Polish example (see above). Mr. Jacob noted that national seminars could contribute to target setting and strategic planning.

Mr. Murillo Corzo stressed that it is important for policymakers to have experience exchange with those who already used AAI for policymaking. One-day seminars could be helpful. He emphasised the importance of choosing the right moment for promoting AAI so that it coincides with the respective lobbying in a country or a region.

The idea of having another International seminar in spring or early summer 2017 was supported by the Expert group. The seminar might provide materials for a research side-event during the UNECE Ministerial Conference on ageing in autumn 2017.

13 OCTOBER (9:00–16:30)

Chair — Ms. Vitalija Gaucaite Wittich (UNECE)

The Chair briefly summarised the main outcomes of the discussion of 12 October and passed to the next topic on the agenda.

Ways of presenting AAI

Ms. Gaucaite Wittich reported on the **national seminar** that took place in **Vilnius** on 21 May. It had been hosted by the Ministry of Social Security and Labour of Lithuania. The idea of the national seminar is to discuss country-specific AAI results in national language with all the major stakeholders and to look into the reasons behind the results and trends, e.g. what policies could have triggered a certain change. Ms. Gaucaite Wittich pointed out that timing was good for having such a discussion as the new social model (including pension reform, retirement age, pension benefits, and others) had been in the course of discussion in Lithuania. Vice-Minister for Social Security and Labour had stated that AAI "needs to be effectively used in setting priorities to address demographic challenges and to improve the quality of life of older persons through implementation of the new social model"[6]. The Ministry of health had been asked to look into the low results in the mental well-being. Also the meeting had helped in terms of encouraging better integration of different ministries, e.g. Ministry of Health, into the development of the new social model.

Mr. Zaidi informed about the most recent presentations he gave on AAI, namely:

- Stockholm: 'Horizons for Comparative and Integrative Research on Ageing and Health', 7-8 October 2015
  - Malta: '2015 UNFPA Executive Training Course on Population, Ageing and Development', 2 October 2015, attended by twenty executive-level government representatives from over 10 countries of mainly Southern Europe.
- Warsaw: International Healthy Ageing Congress, 24 September 2015
- New York: Open-ended Working Group on Ageing (OEWG), Sixth working session, 14-16 July 2015 (for details, please see a PDF version of the presentation).

Mr. Zaidi particularly stressed the point of presenting AAI as a tool to provide comparative insights on various dimensions of active ageing.

Ms. Kharitonova reported on the presentation given at the **Conference** "Active Ageing for Longer and Better Working Lives" that took place on 1 October 2015 in **Riga**. The conference was organised by the Ministry of Welfare of Latvia and the European Union within the project "Latvia: Developing a Comprehensive Active Ageing Strategy for Longer and Better Working Lives" and was attended by over 100 participants representing all major stakeholders: policymakers, researchers, civil society and international organisations. At the conference Ms. Kharitonova had presented the multidimensional concept of AAI and Latvia-specific results, and promoted the idea of organising a national seminar in Latvia.

Mr. Maly spoke about his experience of presenting AAI at the **Second WHO Global Forum on Innovation for Ageing Populations** that took place on 7-9 October 2015, **Kobe**, Japan. One of the issues on the agenda was the provision of evidence for policymaking, choice of adequate metrics and measurement of progress. Mr. Maly had presented the concept and structure of AAI and stressed the integrative approach of the index. The questions that had been raised by the participants concerned the motivation of the countries that find themselves at the top/bottom of the ranking; data shortages; goal settings and others. Representatives of the Japanese research communities had expressed their interest in calculating AAI for Japan.

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[6] http://www.unece.org/index.php?id=39807

Ms. Gaucaite Wittich mentioned that WHO would hold a Global Consultation on the Global Strategy and Action Plan on Ageing and Health (draft 1) on 29–30 October in Geneva, pointing out that the active ageing paradigm could move slightly from social aspect to health.

UNECE Taskforce on Ageing-Related Statistics

Mr. Vikat gave a presentation summarising the work of the Task force on Ageing-related statistics. The Task force was set by the Conference of European Statisticians (CES). It consists of five groups each concentrating on a specific subject linked to four goals of the Vienna Declaration plus demography. Mr. Vikat reminded that Mr. Marin, Mr. Zaidi, Ms. Quattrociocchi and Ms. Daria Squillante (ISTAT) are all members of the Task force. During the week preceding the Expert Group meeting, the final report was submitted to the Bureau of CES for review. After the review by the Bureau the report will go through a round of electronic consultations with the UNECE member States after which it is expected to be endorsed by CES Plenary in April 2016. The report analyses the data availability and quality of relevant data and indicators, identifies data gaps and ways to address them. It also provides recommendations on such subjects as the role of national statistical offices, data collection, communication etc. (for more details see the PDF version of the presentation).

Mr. Zaidi and Mr. Marin thanked Mr. Vikat for leading the work of the Task force. Mr. Zaidi asked what will happen after 2016 following the endorsement of the report. Mr. Vikat replied that a general review on implementation of guidelines based on the recommendations will take place. He stressed that the report is not a basis for a binding mechanism, but rather an instrument for capacity building. Mr. Marin mentioned in regard to the recommendation to include institutional population in sample frame that it is of importance to distinguish between those who are temporarily staying in institutions (hospitalisation, e.g.) and those who are staying for a long period of time.

AAI in non-EU countries

Mr. Zaidi informed the participants about the current results of the work on the AAI computation for Canada, Iceland, Norway and Switzerland. For **Iceland** the results are ready, since all the data are available from the same sources as for EU28. For **Canada**, 17 out of 22 indicators are available, though comparability of some of them is restricted. The International Longevity Centre (ILC) Canada has found five questions on mental well-being and is currently working to construct a mental well-being indicator for Canada. It should be also possible to calculate the indicator 3.2 No unmet need for health and dental care. The EQLS-based indicators, namely 2.1 Voluntary activities, 2.2 Care to children, grandchildren, 2.3 Care to older adults, 2.4 Political participation, 3.1 Physical exercise, and 4.3 Mental well-being, are problematic for Norway and Switzerland. For **Switzerland** there is a possibility to use data from SHARE for the indicators 2.1–3.1. **Norway** did not participate in SHARE. Mr. Zaidi announced that on 15 October 2015 he will meet with the representatives of the Ministry of Health and national statistical office of Norway and will discuss the missing data.

The indicator 4.3 **Mental well-being** turned out to be the most problematic for the countries in question (except for Iceland). Mr. Zaidi looked into a possibility to use data based on the module of SILC 2013 on mental well-being. He explained to the participants the way which he used to adapt the questions used in SILC for calculation of the indicator 4.3. Mr. Zaidi informed that for almost all of the 28 EU countries, the indicator 4.3 calculated based on EQLS is lower than the one based on SILC 2013. He also mentioned that the difference in the results for men and women is smaller if SILC is used. Ms. Zolyomi suggested using a set of questions from the European Social Survey (ESS) for the indicator 4.3, stressing that the sample of persons aged 55 or more in ESS is better than in EQLS which is currently used for this indicator. It was agreed to look at the ESS-based results as well.

Ms. Kharitonova provided an update on the pilot study for **Turkey**, within the framework of which she and Ms. Gaucaite Wittich went to Ankara on 16–18 September for a field visit to have a face-to-

face meeting with main stakeholders including the hosting Ministry of Family and Social policy, other ministries (health, education, labour), National Statistical Office, researchers, NGOs and others. With the currently available data scores for first three domains are possible to calculate. The report on the pilot studies (for Serbia and Turkey) will be finalised by the end of the current phase. She also mentioned the initiative of **the Republic of Moldova** to calculate AAI in order to use it to monitor the implementation of the national Plan of Action on Ageing developed based on the Road Map for mainstreaming ageing (prepared in cooperation with UNECE). The National demographic research centre is working on AAI calculation in collaboration with UNFPA, and Ministry of Labour Social Protection and Family. Ms. Kharitonova mentioned that for most of the indicators the proxies were identified. The exception is the indicator of mental well-being (4.3). The proxies differ in terms of closeness to the original AAI variables. Ms. Kharitonova also reminded the participants about an upcoming **Workshop on active ageing indicators** which will take place on 18 November 2015 in Geneva. The workshop will bring together UNECE national focal points on ageing and specialists from the national statistical offices of the countries of Eastern Europe, Caucasus, Central Asia and Western Balkans and aim at providing, with the help of invited experts, consultations on data sources and proxy identification.

Following the presentation of AAI results for Turkey in comparison to EU28, Mr. Marin raised a question of what reasons can be behind very low social participation in Germany. Mr. Zaidi suggested that the reasons may be low fertility, non-inclusion of institutionalised population; and the fact that Germany "escaped" the crisis where it affected the care provision. Ms. Gaucaite Wittich pointed out the importance of investment in the child care facilities. Mr. Lamura referred to the issue of high mobility of population: families do not live in the same areas and given a size of the country it impedes the care provision to the family members.

Proxy selection

Mr. Engstler suggested, in order to expand comparison of AAI results, to look into usage of "AAI-light" with a reduced number of indicators (somewhat close to a suggestion made by Mr. Jacob on 12 October, see above). Ms. Gaucaite Wittich noted that it is important to keep the indicators so that the countries would look into all the dimensions while analysing AAI results. She added that for the third phase of the project a good way of proceeding could be to look at the usage of proxies at subnational level by countries, and then to use the same proxies at national level if possible.

The impact of population age structure on AAI

Mr. Marchetti presented the results of the analysis he had carried out of the sensitivity of AAI results to age structure, i.e. the impact that a difference in population age structure can make on individual indicators, domain scores and overall AAI. The overall impact of population ageing appears to be low — global impact to variation is of less than 0.5. The strongest age impact is found in employment indicators, particularly in the group 60–64.

The discussion followed on the need to further explore the impact of age structure on AAI. A possibility to introduce age standardisation was also discussed. It was agreed that the age structure impact is very low and this is thanks to the choice of indicators (the age structure factor is already in the index), and that introducing age standardisation is not needed and would rather lead to taking the age factor into account twice. It was however suggested to look into the analysis of correlation between AAI and prospective age.

Interpretation of AAI results using recently introduced goalposts and of relationship of AAI with GDP per capita, Gini coefficient and life satisfaction

Mr. Zaidi started the discussion by pointing out main challenges related to the use of goalposts, namely possible trade-offs between individual indicators; fluidity of the target — will have to be

adjusted with every round of results; a single goalpost for a diverse group of countries, as discussed above, might not be adequate. Mr. Zaidi made a remark that the goalpost (or the distance behind the goalpost) should be seen as a way to understand/interpret AAI results, rather than a goal to achieve. Ms. Perek-Bialas stated that seeing the distance behind the goalpost is helpful for interpretation. It was suggested to look into using a different name for the current "goalposts" to avoid confusion.

Trade-offs between employment and social participation were discussed, and Mr. Jacob referred to the fact that to be taken into account as employed it is sufficient to work one hour during the week preceding the survey, therefore being employed does not prevent a person from being active in social participation. Ms. Gaucaite Wittich reminded that it had been agreed not to introduce the intensity of the employment into the index and stressed the importance of the interpretation of the results. Mr. Zaidi agreed that it is important to have an understanding of context to interpret the AAI results.

Mr. Lamura pointed to the contradiction of indicators 2.2 and 2.3 (care provision): does higher level of care provision mean higher level of activity or exclusion from the society by being pushed back to the family? He also raised a question about the indicator 3.3 Independent living arrangements, referring to the fact that not everywhere older people want to live alone, and that provision of home to younger people can be a way of contributing to society. Mr. Jacob stated that it is important not to undermine the concept of active ageing to which countries committed. Mr. Zaidi reminded that AAI measures the contribution that older people are making to society and there should not be any normative judgements beyond this. Mr. Vikat added that AAI measures activity: the more older people are active, the higher AAI is. Ms. Gaucaite Wittich reminded that AAI measures three ways of contributing to the society — through paid activities, unpaid ones, and through living independently, plus the enabling environment, and that the underlying idea is that more activity is good. Policymakers in cooperation with the civil society, researchers and other stakeholders should see what the best ways to achieve higher level of activity are. Mr. Zaidi remarked that AAI is supposed to give a "nudge" by showing where the country falls behind, but it is up to the country to look into details and to make decisions. Mr. Vikat agreed with this, stressing that the idea of an aggregated measure is to bring together various dimensions. Ms. Gaucaite Wittich added that AAI includes the variety of indicators, and that one indicator, e.g. Independent living arrangements, is "supported" by the others. She also clarified the meaning of the indicator 3.3 Independent living arrangements, i.e. self-sustaining, running finances independently, being household head. Mr. Jacob reiterated that there is a need for clear understanding of questions that we want to answer with each indicator.

Mr. Zaidi also remarked that active ageing does not equal well-being, though can be a prerequisite of the latter. Mr. Marin pointed out that higher level of activity is desirable but it does not necessarily mean that it is ethically desirable.

Mr. Zaidi raised a question if it is useful to continue the **comparison of AAI to GDP, life satisfaction and Gini coefficient** and possibly others. It was agreed that this work should be continued. Such analysis serves well for communication purposes. Mr. Zaidi mentioned that there was a weak relation between Gini coefficient and AAI, and that with further comparison the picture will become clearer. He added that what is clear already now from the implemented analysis is that active ageing does not harm the economy. Mr. Jacob suggested looking into correlation between domains as well. It was also agreed to look into correlation with gender equality level.

The next Expert group meeting is preliminary planned for September or October 2016. Ms. Kharitonova will suggest possible dates to the experts.

The Chair thanked the participants and closed the meeting.