

# **REPORT OF THE EIGHTH MEETING OF THE EXPERT GROUP ON THE ACTIVE AGEING INDEX**

## **I. Organisation and attendance**

The eighth meeting of the Expert Group on the Active Ageing Index (AAI) took place on 26 and 28 September 2018 in Bilbao. It was organised back to back with the Second international seminar on AAI by the European Commission's Directorate-General for Employment, Social Affairs and Inclusion (DG EMPL) and the United Nations Economic Commission for Europe (UNECE), and hosted by the University of the Basque Country (Bilbao, Spain). The meeting was attended by 23 participants.<sup>1</sup>

## **II. Objective**

The meeting aimed at discussing with the experts and getting their advice on most recently implemented and ongoing activities, including the draft Guidelines on application of AAI in non-European Union (EU) countries and at subnational level; preliminary outcomes of the study of AAI results for different population groups in Italy, changes in two AAI variables and others. The experts were also asked to participate in the discussion of the future web-tool for AAI. The second part of the meeting was devoted to the exchange of opinions on the Second international seminar on AAI and the future activities under the project with a specific focus on the index promotion.<sup>2</sup>

## **III. Brief summary and overview of decisions<sup>3</sup>**

The experts welcomed the draft Guidelines on application of AAI in non-EU countries and at subnational level which offer instructions to potential users on how to calculate the index depending on the context and needs of the user. The guidelines describe 10 steps to follow starting from defining the goal of AAI calculation via selecting suitable data sources and variables to the analysis of the AAI results and comparability tests. The experts provided a number of recommendations for revision including stressing even more what exactly the index measures, making a warning on potential risks of manipulations more explicit, as well as and outlining ways of preventing such manipulations, and several methodology matters to consider.

Most recent developments in EU AAI results were discussed, with a particular focus on the change in two indicators (2.2 and 2.3) following the modification of respective questions in the underlying survey (European Quality of Life Survey (EQLS)). These changes led to a significant decrease and increase respectively in these two indicators in comparison with the last issue of AAI (based on EQLS 2012). It was stressed that it is important to be aware of these changes when interpreting and presenting AAI results over time; it was suggested to calculate the respective indicators using the Survey of Health, Ageing and Retirement in Europe (SHARE) to make the credibility check. It was agreed that the name of the indicator 2.3 should be adjusted to better reflect what it measures.

The discussion on "goalposts", introduced in 2014 (the index/domain score calculated based on the maximum values of all the indicators (for men or women) among the EU countries over a given period of time) demonstrated the difference of opinions. On the one hand there was lack of understanding as to why such measure is needed at all, on the other hand while admitting that they are needed for the interpretation of AAI results and their changes in time, several experts made a point that the current way of calculating is not suitable and that the term "goalpost" should be modified. There was no decision made on the way to proceed or the name to use.

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<sup>1</sup> See Annex 1 for the list of participants.

<sup>2</sup> See Annex 2 for the meeting agenda.

<sup>3</sup> See Annex 3 for the minutes of the meeting.

The experts welcomed the third study of AAI results for different population groups, this time in Italy. The preliminary results confirmed in some ways those of the two previous studies (for Germany and Poland). For example, the education level is the most important factor of inequality in active ageing and living in rural or urban area — the least important one in all three studies. The Italian study added two more criteria to previously used sex, education level and income level, and type of locality (rural/urban), namely family settings and geographic macroarea (Centre, North, South). The report will be published later this year or in 2019.

The Expert group was informed that the AAI web-tool will be developed by the European Commission's Joint Research Centre based on the Cultural and Creative Cities Monitor (CCCM) website. The latter was presented briefly to the experts who were then asked to give their views on the functionality of the future AAI web-tool. A number of useful comments and suggestions were made by the experts and collected by the project team who will transfer them to the developer.

The second part of the meeting that took place right after the end of the Second international seminar on AAI was mainly devoted to the discussion of the outcomes of the latter. It also touched upon the promotion of AAI, its future and sustainability. The seminar was overall seen as successful and well organised; and the discussions held as lively and interesting. However, it was noted that the number of policymakers who took part in it was still rather low despite the efforts to increase their participation. Among the suggestions made in this regard were: to make it explicit how AAI evidence can serve policymakers; to have more publicity “speaking” directly to the policymakers; reach out to subnational level policymakers; to organise a special workshop for policymakers back to back with the next such event. In terms of organisation, it was also suggested to split the poster session into two, as the one longer session turned out to be tiring for participants.

Another matter that came up during the seminar that the experts discussed was that of an alleged need to simplify the index for the policymakers and possibly other users to be willing to apply it. Based on the discussion at the Expert group meeting it could be noted that there is no need for simplification of the index as such (which could undermine the index reliability), but a need to make the communication about it clearer and adjusted to the groups of interest to which it is being presented. A number of other interesting suggestions were made (see Annex 3 for detail).

Several ways forward for the project and AAI were suggested and discussed. However, some decisions, it was pointed out, should be made before moving forward, namely 1) division of roles among EC, UNECE and the Expert group; 2) relevance of aspiring to make AAI a mandatory tool at the EU level. It was pointed out that the presentation of the index to the Social Protection Committee for the second time requires strong political support. It is important to make the linkages between AAI and the Pillar of Social Rights (as well as with SDGs) explicit in order to demonstrate the usefulness of the index for policymaking at different levels.

The experts were informed that the project could be extended by four months (till the end of August 2019). The planned activities include: a pilot study at subnational level in Romania with a meeting to discuss the outcomes (November 2018/April 2019); analytical report on AAI trends. Web-tool development (November 2018-March/April 2019). If project is extended, a stakeholder meeting would be organised to launch the web-tool and the analytical report. A one-day meeting of the Expert group on AAI would be organised back-to-back to the stakeholder meeting.

Main highlights of / decisions taken at the meeting are as follows:

### **Research**

- Experts welcomed the Guidelines on AAI application in non-EU countries and at subnational level as a step towards wider use of AAI and provided a number of concrete recommendations for revision. The project team will collect the comments and send to the research consultant.

- Changes in the two EQLS-based indicators need to be treated with caution when presenting AAI results over time. It was decided to adjust the name of the indicator 2.3 to better reflect the revised underlying variable.
- The methodology paper (annex) is to be updated by a research consultant so that the calculation of indicators is as clear as possible for external users.
- Experts welcomed and acknowledged the usefulness of the research study of AAI results for different groups of older population in Italy.
- Though several opinions were voiced no agreement was reached regarding the use of “goalposts”, their modification or change of their name.
- A pilot study of subnational AAI in Romania will be carried out.

#### **Outreach, promoting use of AAI and communication**

- The Second international seminar was successful and well organised, but more efforts are needed to make such events appealing for policymakers.
- It is essential to continue working on AAI presentation to stakeholders: the relevance of the index has to be made explicit; aspects that matter to different groups need to be highlighted; the communication about AAI needs to be made clearer and “speak the language” of each group of interest.
- The project team collected the suggestions of the Expert group on the future AAI web-tool and will transfer these to the developer.
- Work on the wiki-space needs to be continued, taking into consideration, to the extent possible, the suggestions made by the experts.
- A national seminar on AAI at subnational level will take place in Romania in 2019.
- An analytical report analysing AAI trends over the period 2008–2016 will be prepared and published in 2019.
- A stakeholder meeting will be organised in 2019 (see above) to launch the web-tool and the analytical report.

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## ANNEX 2. AGENDA OF THE EIGHTH EXPERT GROUP MEETING

### DAY 1: 26 SEPTEMBER 2018

**Chair: Vitalija Gaucaite Wittich, UNECE**

- 11:30 – 11:45 Welcome  
*Vitalija Gaucaite Wittich, UNECE*  
*Ettore Marchetti, European Commission*
- 11:45 – 12:15 Updates on AAI results, changes in two indicators  
*Asghar Zaidi, London School of Economics and Political Science*
- 12:15 – 12:45 Q&A and discussion on addressing comparability issues when presenting AAI results
- 12:45 – 13:05 AAI in non-EU countries and at subnational level: Guidelines  
*Maria Varlamova, National Research University, Higher School of Economics (Moscow)*
- 13:05 – 13:30 Q&A
- 13:30 – 14:10 Lunch (served in the room)**
- 14:10 – 14:25 Setting the goalposts for AAI  
*Ettore Marchetti, European Commission*
- 14:25 – 15:10 **Discussion** on the appropriate methodology for setting goalposts / targets in the future
- 15:10 – 15:30 Analysis of AAI results for selected population groups in Italy  
*Giovanni Lamura, INRCA*
- 15:30 – 15:45 Q&A
- 15:45 – 16:00 AAI web-tool: building on “Cultural and Creative Cities Monitor”  
*Olga Kharitonova, UNECE / Ettore Marchetti, European Commission*
- 16:00 – 16:40 Feedback from the experts on the tool functionality
- 16:40 – 16:50 Summary  
*Vitalija Gaucaite Wittich, UNECE*
- 16:50 Close of day one**

### DAY 2: 28 SEPTEMBER 2018

**Chair: Ettore Marchetti, European Commission**

- 14:30 – 14:45 Welcome, including first impressions from the seminar  
*Ettore Marchetti, European Commission*  
*Vitalija Gaucaite Wittich, UNECE*
- 14:45 – 15:45 International seminar
- Feedback from Chairpersons
  - Tour de table on most important points and lessons learned / first impressions etc.

- 15:45 – 16:00 AAI project: further steps  
*Vitalija Gaucaite Wittich, UNECE*
- 16:00 – 16:10 Q&A
- 16:10 – 16:15 Summary  
*Ettore Marchetti, European Commission*
- 16:15** *Close of the meeting*



## ANNEX 3. MINUTES OF THE EXPERT GROUP DISCUSSION

**26 September (11:30–16:50)**

*Chair — Ms. Vitalija Gaucaite Wittich (UNECE)*

The Chair welcomed the participants and opened the meeting. She reminded the participants that the meeting will be in a slightly different format, with the first part taking place today, and the second part — right after the end of the seminar on Friday 28 September. The Chair thanked all the members helping with the organisation of the seminar, and specifically those who were members of the Evaluation board for their hard work and dedication, as well as poster session conveners and panellists. She thanked also the representative of the University of the Basque Country, Yolanda Gonzalez-Rabago, for hosting the seminar and the Expert group meeting, and the invaluable help with organisation of these events in general.

The Chair gave a brief update on the work of the UNECE Task Force on measuring old-age population in institutions — draft of the guidance (recommendations) is expected in the end of 2018, and will be open for consultations in March 2019; the inputs of the Expert group at that stage would be appreciated; in June 2019 the Conference of European Statisticians is expected to sign off the work of the Task Force.

She also informed the participants about the upcoming [UNECE Regional Conference on ICPD+25](#) “Enabling Choices: Population Dynamics and Sustainable Development” (1–2 October 2018), Geneva, Switzerland, aiming at assessing progress and identifying gaps in the implementation of the ICPD Programme of Action in the UNECE region.

On 1 October, the International day of older persons, UNECE is also organising an [exhibition](#) devoted to the older human rights champions.

The representative of the European Commission, Mr. Ettore Marchetti, welcomed the participants on its behalf. He stressed the continued commitment of the DG EMPL to the AAI project. Following up on the discussion at the seventh EG meeting, he informed the participants that the Social Protection Committee was not yet approached for the AAI to be considered for the second time. It is, however, planned.

Mr. Marchetti mentioned that the European Commission’s [Pension adequacy report 2018](#) was launched in April 2018. The report highlights a number of issues, including insufficiency of the pension to ensure no poverty risk for 18.2 per cent of people aged 65 and above; persisting inequalities among population groups (by sex, age, type of employment etc.) and the need for further improvements in pension systems.

Mr. Marchetti also informed the participants that the wave 8 of the Survey of Health, Ageing and Retirement in Europe (SHARE) is funded by the European Union (EU) and is to cover 27 EU countries, but there seem to be uncertainties about the timing of the beginning of work. The field work is planned for 2019.

Given that the meeting was attended by some guest participants, the Chair asked everyone to present themselves and give AAI-related updates if any.

Ms. Anne-Sophie Parent (AGE Platform Europe) welcomed the work of the Task Force on measuring old-age population in institutions, stressing the vital importance of obtaining data on this large but not monitored population group. She also stressed the relevance of the AAI for the age-friendly environments and for the European Pillar of Social Rights. Ms. Parent mentioned that in 2019 there are plans to draw attention to active ageing in Belgium, and that there is a potential for the AAI to be applied.

Mr. Giovanni Lamura (National Institute of Health & Science on Ageing (INRCA/IRCCS)) informed the participants that INRCA was approached by the Italian Presidency of the Council of Ministers to involve them in the work to develop an active ageing policy at the national level in Italy. The AAI is planned for inclusion as a monitoring tool.

Ms. Jolanta Perek-Białas (Warsaw School of Economics and Jagiellonian University, Krakow) gave a brief overview of the national seminar on AAI that took place in Warsaw, 18 June 2018. The seminar was co-organised with and hosted by the Ministry of Family, Labour and Social Policy. It was attended by more than 60 experts and representatives from different ministries, Central Statistical Office and other Government agencies, academia and NGO representatives. The seminar discussed application of the AAI at subnational level and for analysis of the situation of different population subgroups. The AAI was recognised as an easy-to-use informative tool for experts and policymakers. The Ministry Family, Labour and Social Policy is planning to continue supporting future calculations of the AAI at both national and subnational levels.

The Chair gave the floor to Ms. Maria Varlamova (National Research University, Higher School of Economics (Moscow)) — the author of the newly prepared **guidelines for calculating AAI at subnational level and in non-EU countries** — to present the results of her work.

Ms. Varlamova gave a detailed overview of the guidelines. The latter offer instructions to potential users on how to calculate the index depending on the context and needs of the user. The guidelines include an easy-to-follow scheme of 10 steps starting from defining the goal (why one needs AAI, e.g. for international comparison or local measurement) via selecting suitable data sources and variables to the analysis of the AAI results and comparability tests. The guidelines stop on each of these steps and provide examples of possible alternative variables for 22 AAI indicators with an estimated impact of the use of the variable on the indicator value. Ms. Varlamova particularly stopped on the question of dealing with weights and their possible adjustments according to the needs of AAI use. She also drew attention to the matter of “goalposts” to be used for AAI analysis. The currently used AAI “goalposts” (based on the maximum value among EU countries for each indicator during the given time period) are not fixed and are increasing with the growing AAI results for EU countries. This could be demotivating, as no matter how one tries the “goalpost” will still be unattained.

The Chair stressed that the structure of the guidelines follows suggestions made by the experts at the seventh meeting of the group in 2017 and invited participants to comment.

Ms. Parent pointed out that different levels of government in a country need to understand what they can do, what their authority is, and there should be coordination between local/regional/national levels. The index needs to be applied, therefore, in a coordinated way to be able to monitor progress over years at all these levels, while guidelines currently push into deciding on one way to proceed depending on the goal — international comparison or local needs.

Mr. Asghar Zaidi (London School of Economics and Political Science) reminded that AAI, as opposed to, for example, the Liveability Index by AARP, was not formed following any specific policy, but rather its indicators were identified and then linkages with concrete policy measures were made.

Ms. Varlamova suggested not to limit oneself to just one AAI. It is possible to develop one for international comparison, and another (or other) adjusted version(s) for meeting the local needs. It is also important that the time for the policy measures to have an effect is taken into account. She also pointed out that a linkage between policies and indicators cannot be universal, and that it is country- or level-specific.

The Chair pointed out that AAI application for different needs does not necessarily mean usage of a different methodology approach and reminded about the example of Poland and the AAI calculations made for subnational level and for population subgroups using the same indicators and methodology.

Mr. Lamura welcomed the guidelines as a step forward to improving applicability of AAI. He stressed the importance of making it clear in the guidelines that a) there are specific assumptions behind the original weights which should be taken into account if weights are modified to meet local policy priorities; b) there should not be any normative judgement in the AAI result interpretation.

Mr. Johan ten Geuzendam (European Commission) warned that adjustments of methodology to local needs, including change of weights, open room for manipulations, let alone diminish stability and undermine international comparison. The warning about potential risks, he stressed, should be made more explicit in the guidelines. Mr. ten Geuzendam also suggested using a different name for an adjusted AAI such as a “derived AAI”.

Mr. Zaidi reminded that at the initial stages of the AAI development the sensitivity analysis was carried out showing that unless weights are changed drastically the ranking does not change a lot, i.e. AAI is stable against small variations.

Ms. Lidia Bratanova (UNECE) expressed a concern that the term “proxy” used in the guidelines could be misinterpreted (e.g. a different meaning in the Sustainable Development Goals context). She suggested using different terms, for example “EU-AAI” and national AAI to distinguish because an AAI calculated following the “original” methodology and the one calculated with certain adjustments to meet the needs at a national level. Ms. Bratanova also stressed the importance of drawing attention of national statistical offices to AAI. Such promotion could potentially be done in the United Nations.

The Chair pointed out that the name of the index, even if with modified weights, needs to be kept as is to ensure continuity. She also reminded that the Expert group and the project team contributed to the work of the UNECE Task Force on ageing-related statistics, and thus AAI was already somewhat promoted at the United Nations.

Mr. Mark Keese (OECD) questioned the usefulness of ranking for the interpretation of the AAI results. He suggested clustering could be a better way of looking at the results. Mr. Keese also pointed out that at a subnational level there could actually be more data than needed for the AAI calculations, for example, from administrative sources. The question would be how to bring the administrative data in the index.

Ms. Varlamova replied that at a subnational level, based on the example of the Russian Federation, the data available are more suitable for input indicators, while AAI uses mainly outcome indicators. The input ones are better suited for contextual analysis.

Ms. Parent stated that AAI lacks indicators measuring policies empowering older persons to be more active, e.g. availability of public transport, and that such indicators should be added to complement the AAI at subnational level.

Both the Chair and Mr. Zaidi stressed the need to preserve the core structure of the AAI and not to bring in more data or indicators.

Regarding Mr. Keese’s suggestion on clustering, Mr. Marchetti pointed out that though it is a good way of presenting results, users find it hard to understand. Mr. Zaidi mentioned that in 2015 in the Analytical report three country clusters were identified. Mr. Lamura added that we rather need to help readers read the data than to have them look only at an easy-to-understand ranking.

On the matter of possible risk of manipulation, the Chair reminded that AAI is a living instrument and one cannot prevent users from changing weights or indicators. Ms. Varlamova said there are ways to prevent manipulations, such as a requirement to keep the methodology (even if adjusted) consistent in time. Ms. Eszter Zolyomi (ECV) added that in the end, what matters for reducing risk of manipulations is the quality of indicators which should be documented.

It was agreed to make a warning on potential risks of manipulations more explicit in the guidelines, as well as and to outline ways of preventing such manipulations.

Mr. Jürgen Bauknecht (University of Applied Sciences, Düsseldorf) pointed out that for the AAI analysis not only ranking and goalposts are important, but also the connections that are valid for all the EU, e.g. employment vs attitude to working (at older age) and vs country context; or care provision vs care facilities.

Mr. Heribert Engstler (German Centre of Gerontology) suggested complementing the guidelines with a recommendation to use estimates in addition to available data to improve reliability in cases where the number of respondents is too low (local level).

Ms. Varlamova replied that complementing data with estimates could be complicated for external users (not all of them are statisticians) and also could cause distortions of the results, but promised to look into the matter.

Ms. Kharitonova is to send the guidelines to experts for their comments.

Mr. Zaidi presented the **2016 AAI revised results** stopping on several issues with the indicators, and in particular two indicators based on the European Quality of Life Survey (EQLS) — 2.2 (Care to children, grandchildren) and 2.3 (Care to older adults) — that were changed in the original survey between the EQLS 2012 and EQLS 2016. In general, Mr. Zaidi highly appreciated the developments in EQLS. At the same time, the occurred changes affected the AAI results (see below for background information on the indicator change).

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### **Background information on the change in the indicators 2.2 and 2.3**

The AAI indicators 2.2 and 2.3 saw a change in the underlying questions due to the respective change in the EQLS 2016 wave. Specifically, the question for the indicator 2.2 Care to children and grandchildren was changed from “How often are you involved in caring for your children, grandchildren” to “How often are you involved in caring for and/or educating your children / in caring for and/or educating your grandchildren”. Thus, the word “education” was added and the answer categories were split in two. In addition, the filters for the survey questions were modified. Also, filters were introduced as to who gets asked these questions.

The indicator 2.3 Care to older adults was changed in the following way: from “How often are you involved in Caring for elderly or disabled relatives” to “How often are you involved in caring for disabled or infirm family members, neighbours or friends under 75 years old / caring for disabled or infirm family members, neighbours or friends aged 75 or over”. The answer categories were also split, and the care receiver groups were modified and extended.

The value of the indicator 2.2 decreased, in comparison to EQLS 2012, in the majority (22) of EU countries. In 15 countries the drop was by more than 5 points, including Ireland, Italy, Lithuania and Slovenia where this drop was about 15 points or more. This is mainly explained by the introduction of the filters.

The values of the indicator 2.3, in comparison to EQLS 2012, on the contrary, increased almost for all the EU countries, which could be explained by the extension of care receiver categories. In countries with (some of the) francophone population, namely Belgium and France, the increase was even higher than for the other countries, which could be in part explained by the change in the translation into French to make the indicator more explicitly about family members and not only parents.

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Mr. Zaidi suggested revisiting usage of the Labour Force Survey (LFS) as the source for the indicators 3.8 (Lifelong learning) and 4.6 (Educational attainment). He also pointed out that the seventh wave of the European Social Survey (ESS) covered only 22 countries,<sup>4</sup> and that it might be worth looking for other options for sources for the indicators 3.7 (Physical safety) and 4.5 (Social connectedness) currently based on the ESS. An initial problem with another EQLS indicator — 4.3 (Mental well-being) was resolved.

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<sup>4</sup> Of which 18 EU countries for which data are available ([https://www.europeansocialsurvey.org/data/country\\_index.html](https://www.europeansocialsurvey.org/data/country_index.html)).

Mr. Zaidi also pointed out that the differences between the values of indicators 4.1 (Remaining life expectancy achievement of 50 years at age 55) and 4.2 (Share of healthy life years in the remaining life expectancy at age 55) when calculated based on the European Health and Life Expectancy Information System (EHLEIS) data are almost identical to when calculated based on the Eurostat data and can be interchangeable.

Looking into three country clusters (top-, middle- and low-performers) there are some changes in time within the clusters but belonging to a cluster did not change much with time. The gender gap persists.

The discussion followed:

1) Regarding the gender gap, Mr. Keese suggested that the prevalence of the Employment domain in the index could cause the imbalance (men being more active in the labour market). Mr. Karel Van Den Bosch (Belgium Federal Planning Office) pointed to a possible bias due to women being an older population subgroup.

2) On how to proceed with the changed indicators when analysing and presenting trends: Mr. Zaidi suggested to carry out comparison with caution. The SHARE could be used for calculation of the respective indicators and for an eventual credibility check. He also stressed that the methodology of the indicator calculations (annexes to Zaidi et al. Active Ageing Index 2012. Concept, Methodology and Final Results) needs to be revised and updated. Mr. Keese suggested to investigate if using the same filters for EQLS 2012 and EQLS 2016 will resolve issues with the indicators 2.2 and 2.3, and if not, suggested to keep using data for previous years.

3) On the need to change the name of the indicator 2.3 as it is no longer applicable to call it “Care to older adults”. It was agreed that the name will be changed to better reflect the new survey question.

Mr. Marchetti made a brief overview of the “**goalposts**” that have been used so far for AAI and presented the 2016 AAI goalposts. Introduced in 2014, the “goalposts” are the index/domain score calculated based on the maximum values of all the indicators (for men or women) among the EU countries over a given period of time. The “goalposts” have been, unsurprisingly, increasing with the growing values of AAI in EU. Mr. Marchetti stressed that due to the concept “goalposts” would be different for different territorial entities. The questions to the expert group was if the current approach to setting “goalposts” should be preserved, and, if not, what should be used in their place.

The point made earlier by Ms. Varlamova regarding the moving and thus potentially demotivating goalposts was reiterated.

The need for goalposts was questioned by Mr. ten Geuzendam and Mr. Keese. Mr. Zaidi and Mr. Marchetti referred to the need to interpret the AAI results: a) 100 points is not a target to achieve, therefore it is not clear without a goalpost what is to be achieved, what to use as benchmark; b) need to understand what, for example, a two-point change mean in terms of the AAI.

A number of suggestions were made in favour of changing the term “goalpost” to “maxima” or “benchmark”. There was no agreement reached on the matter. No decision was taken regarding methodology for setting “goalposts”.

The other direction of the discussion was **interpretation of the AAI results**. Mr. Keese argued that there won't be a goalpost that would allow avoiding normative judgement. He also pointed out that comparing with “best country” would occur in any case and thus it is a “natural benchmarking”. Mr. Keese stated that AAI should be simple for users to understand, but that the existing “goalposts” add a “layer of confusion” and make AAI more complicated.

Mr. Keese and Mr. ten Geuzendam questioned if higher values of AAI could be desirable or could mean “better” results. Mr. Bernd Marin (European Bureau for Policy Consulting and Social Research) also pointed out that there are implicit normative assumptions when we interpret the AAI results.

The Chair, Mr. Zaidi and Mr. Bauknecht reminded that AAI highlights the contributions of older persons to the society and economy, and therefore the higher the AAI values are the better the situation is in terms of having higher contributions.

Ms. Varlamova suggested that there are two “better”: one where the higher contribution by older persons is better for the society; and the second is a not necessary “better” for older persons themselves.

Mr. Koen Vleminckx (Belgian Federal Public Service Social Security) argued that more active ageing actually is better, and that the situation with high level of active ageing could become negative only in case if society relies / depends on the participation of older persons only.

Mr. Lamura pointed out that, given the way AAI is used, its higher values mean that a given entity is closer to active ageing. Higher independent living would mean higher contribution to society, and AAI as a policy tool shows the progress made towards higher level of activity. He also argued that while on some indicators there is a universal agreement that their higher value is better (e.g. mental well-being, healthy life expectancy), for many there is not. Therefore, Mr. Lamura argued, the application of AAI should be flexible, and the guidelines presented earlier are a good step towards facilitating such flexibility.

Mr. Van Den Bosch argued that active ageing is the requirement of the EU policy, hence there are clear normative implications. And AAI follows the active ageing policy principles. He added that at the same time the information about the goal of AAI application and its limitations should be made very clear.

Ms. Bratanova pointed out that interpretation of the AAI results should be aimed at promotion of relevant policies and raised a question regarding the best ways to ensure such interpretation.

Mr. Zaidi agreed that AAI is an analytical and information tool that provides its users with information that can be used for policy measures. He added that it is important “not to blame the victims” — those entities that have lower AAI scores — and reminded that the fourth domain (Enabling environment) is included in the index in particular to avoid such “blaming”.

The meeting moved to its next part, specifically to the presentation by Mr. Lamura of preliminary results of the study implemented by INRCA (under the AAI project) on the **analysis of AAI results for different population subgroups in Italy** over the period 2007–2016.<sup>5</sup> The population subgroups were divided by the following criteria: sex, geographical macroarea (North, Centre, South), education level, income level, family setting, locality (urban or rural settings). Six following data sources were used: Labour Force Survey, Aspects of Daily Life, Family and Social Subjects, EU-SILC, Causes of Death, Health Conditions and Use of Health Services.

There was an increase in all the domains over the period in question, except for the Participation in Society (decrease of 0.4 points). The highest increase was observed in the Employment domain, and it is largely due to an increase in employment of those at the age up to 64 following the increase in the retirement age. In the social participation domain, the biggest decrease was observed for the indicator 2.2 Care to children / grandchildren. A possible explanation for this could be a higher level of unemployment among younger groups which results in a higher number of people taking care of their children themselves, and thus leading to a decrease in provision of care by grandparents. Other indicators that saw a decrease are political participation, no unmet needs for health and dental care (largely due to dental care), no material deprivation, physical safety and social connectedness.

Overall the North has highest results, with the Centre being less than a one point behind, while the South’s AAI is four points lower than that of the Centre.

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<sup>5</sup> UNECE/European Commission (2019) “Criteria-specific analysis of the Active Ageing Index in Italy”, Report prepared by Andrea Principi of the National Institute on Health and Science of Ageing (IRCCS INRCA), Ancona, Italy, in collaboration with Mauro Tibaldi and Luciana Quattrociochi (ISTAT) and Pietro Checucci (INAPP) under the contract between INRCA and the United Nations Economic Commission for Europe (Geneva), co-funded by the European Commission’s Directorate General for Employment, Social Affairs and Inclusion (Brussels).

Over the period 2007–2016, the gender gap seems to be narrowing down for a number of AAI indicators. At the same time, the differences between geographical macroarea are growing with trends for increase in AAI being much more pronounced in the North and the Centre than in the South. The biggest differences are observed among population groups divided by the level of education. The socio-economic gap appears to be closing, however it is mainly due to a decrease in the AAI results of population subgroups with higher socio-economic status than the other way about.

The participants commented on the presentation:

Mr. Marin highlighted three surprising findings: 1) income plays a very limited role, while education differences affect AAI results very strongly; 2) almost no differences are observed between urban and rural areas; 3) the social participation domain is the only one where the results of the Centre are closer to those of the South than to those of the North. In addition, he suggested that there is certain “passivisation” of population which led to a decrease in, for example, political participation.

Ms. Varlamova noted a fourfold increase in the use of ICT indicator, and asked if the data used for different points in time are comparable or if this increase could be a result of a specific policy measure.

Ms. Perek-Białas pointed out that in Poland the ICT use shows the same increase trend which is driven by a higher share of highly educated people among the older population, almost 100 per cent of whom use ICT. In addition, some programmes were put in place to help older persons to use ICT. This higher level of using ICT, she remarked, could be one of the reasons for declining social connectedness.

Mr. ten Geuzendam welcomed the new aspect of the study — the living situation — bringing new insights into the AAI results for older population.

Ms. Kharitonova will inform the Expert group when the study report is ready and uploaded to the wiki.

Ms. Kharitonova informed the Expert group that the **AAI web-tool** will be developed by the European Commission’s [Joint Research Centre](#) and presented the [Cultural and Creative Cities Monitor](#) (CCCM) website that will serve as a basis for the future AAI web-tool. The tool will be developed over a period November 2018 – March 2019. She then asked the participants to give their opinion on the AAI tool functionality, namely: additional functions; best disaggregation categories for displaying results, keeping in mind data availability; usefulness of adding an option of target setting, and others.

Several matters were clarified in the discussion that followed. Though the CCCM platform provides the basis, a separate web-tool will be developed for AAI. The cities that are the basic entities in CCCM will become countries (or regions if possible) in the AAI tool. Comparing entities will be possible. The EU-AAI will be presented for all the years for which we have data (2008-2016).

Mr. Van Den Bosch noted that it is a useful and promising development and asked to make sure that the tool is accessible to policymakers. Mr. Zaidi underlined the importance of the technical and methodology support of the website to provide information to the users upon request on the website functionality but also on the index itself. Ms. Perek-Białas suggested to have a “beta-test” of the draft version of the tool among the group of interest. Mr. ten Geuzendam reminded about the EU requirements in terms of accessibility of the web pages.

Regarding the disaggregation criteria, the following ones were suggested: GDP per capita, sex, share of population aged 55 and above, and possibly life expectancy.

Ms. Zolyomi, Mr. Lamura, and Ms. Perek-Białas expressed their opinion that displaying the top five entities in each group (defined by the above criteria) is unfriendly. The project team argued that there will be fewer entities. Ms. Zolyomi added also that having group disaggregation is too complicated for users, and that the home page should show just the AAI results.

No decision was taken as to the use of targets. The project team will enquire about the video tutorial for the tool.

**28 SEPTEMBER (14:30–16:15)**

*Chair — Mr. Ettore Marchetti (European Commission)*

The Chair opened the floor for the first impressions of the participants on the **international seminar**.

Ms. Luciana Quattrociochi (Italian National Institute of statistics) pointed out the variety of the presented papers. She also stated that the question of inequality has become very prominent, this concerns also migrants. Ms. Quattrociochi added that it is important to consider population structure in AAI results. She suggested to consider having an exchange on the AAI wiki regarding these matters.

Mr. Robert Anderson (Eurofound), one of the poster conveners, suggested that there should be more time allocated for poster presentations and feedback. Mr. Anderson pointed out that there seem to be a committed community of older and younger researchers who have a visible need to exchange. The latter require a suitable platform, perhaps wiki could serve as one. He also noted that although there are a few examples of experience of using AAI, we need to encourage it further.

Mr. Bernd Marin also suggested increasing the time for poster presentations.

Ms. Sarah Harper (Oxford Institute of Population Ageing), the Chair of the evaluation board and of one of the plenary sessions, agreed that the posters are very valuable and that there should be two poster sessions, also for the reason of a one long session being tiring for participants (the point further supported by Ms. Parent). She made a point that in comparison to the seminar in 2015, the research community has upped their game by delivering papers of a much higher quality. In this regard, it was harder to select best papers in 2018. She noted that there were younger and older researchers and quite a few of “return visits”, i.e. authors who participated in both 2015 and 2018 seminars. Ms. Harper stated that despite the efforts, the seminar failed to attract significant number of policymakers. An important step would be to make it explicit how AAI evidence can serve policymakers. At the same time, participation of international organisations was an achievement. The raised topics focussed on inequalities, the oldest old, use of AAI as a frame to approach other methodologies. A couple papers matched the individual and societal level which is very useful.

Mr. Sergio Murillo Corzo (Biscay Provincial Government) shared his impressions as a co-organiser. He found the seminar successful and mentioned many positive feedback messages from the participants. Mr. Marin said that it would have been good to have a visit of Bilbao organised to discover its age-friendliness, especially interesting given the industrial past of the city and the changes it went through. Mr. Murillo Corzo promised to share a brochure on the age-friendly “equipment” of the city.

Mr. ten Geuzendam evaluated the seminar as very good. The issue of importance, he stated, is the communication of AAI results. The aim should not be to oversimplify the information on AAI, but make the communication about it effective. A few catchy messages about AAI that would help to promote it need to be identified. Mr. ten Geuzendam added that it is important to focus not only on the overall AAI score, but look in depth, i.e. at the individual indicators. He stressed that the Guidelines for calculating AAI in non-EU countries should be able to help “external” users to apply the index. He also suggested that at the current stage of the AAI development, it is more important to ensure comparability over time than keep refining the methodology.

Mr. Anderson pointed out that many papers presented at the seminar focused on the current state of affairs, while it is important to look at AAI in its development over time. Mr. ten Geuzendam agreed that the AAI needs more of a longitudinal quality.

Mr. Zaidi suggested that it would be good to involve more data producers, such as representatives of national statistical offices in further such meetings.

Mr. Engstler noted that many papers were devoted to the questions of connecting AAI with other dimensions such as quality of life or well-being which used to be to some extent competitive with AAI.



Another aspect, he mentioned, was highlighting social inequalities and how to value them, as score and dispersion both vary.

Mr. Vleminckx reiterated that while we have a confirmed interest from the academic community, engaging policymakers needs more effort. For this, the AAI presentation does not need to be simplified, but the relevance of the index to policymakers should be made explicit. It is important to make use of the results of the calculations, especially those linked to inequality and well-being, so that policymakers get on board. He asked to make the materials from the seminar available on the wiki. Ms. Kharitonova explained that presentations and posters will be uploaded there provided the authors give the authorisation.

Mr. Zaidi expressed his opinion that the project team and the Expert group have made a lot of progress in making the public aware of what AAI is capturing. On the other hand, he noted, a number of papers provided convincing arguments that the way in which the index was established can be challenged and that things could be done differently.

Ms. Parent made a point that the discussed need to simplify AAI could come from an assumption that the AAI results are provided to someone who is not familiar with the active ageing framework, while it is not often the case. She gave an example of the European Pillar of Social Rights, where for each of the twenty principles indicators are needed, and AAI can already give a lot of relevant information. This relevance just needs to be made more explicit. Ms. Parent added that it has to be made clear how AAI can be of use at grass-roots level.

Ms. Parent also advised to upload presentations on the web at the same time they are given so that participants could follow online, as it was not always easy to see on the screen. Ms. Parent added that instructions for preparing presentations should be made clearer.

Mr. Kenneth Howse (Oxford Institute of Population Ageing) stated that it is easier to engage policymakers at subnational level rather than national. He pointed out that the more “waves” of AAI will be calculated the more it will be appealing for potential users. Mr. Vleminckx reminded that the policy responsibility often stays with the national level. Ms. Parent replied that nonetheless the agencies (ministries) at the subnational level are closer than at the national level. Mr. Vleminckx also emphasised the importance of the role of the research centres in monitoring policy implementation for the government.

Ms. Bratanova raised a number of questions related to the future of the index and sustainability of the work under the project. Specifically, where this work will be in the next years; what the project team and the Expert group are leaving for those who are coming after; how to ensure continuity; how can the Expert group together with EC and UNECE advance the work and ensure its sustainability. She pointed out that the Expert group is relatively new and that it would mature with time. Ms. Bratanova came back to the question of simplification of AAI supposedly desired by its users and stressed that the goal should not be to simplify, as this could potentially undermine the reliance of the index, but to improve the communication about the index and its usability. The efforts should be made, driven by the Expert group, to promote AAI. A communication strategy could be developed. She gave an example of the Human Development Index (HDI) which can also be criticised, but is widely used and liked by policymakers. Ms. Bratanova also suggested that some physical exercise / activity could be useful to organise at the next such event.

Mr. Marin reacted that it is important to divide the roles / responsibilities in terms of advancing the work on AAI. He also pointed out that simplifying the index should mean reducing its complexity without undermining the reliability.

Ms. Varlamova continued the discussion of the seminar by highlighting two trends that she noticed regarding the content of papers submitted: 1) lack of understanding of the core structure and the rationale of the index by the authors; 2) overuse of the index — applying it to matters for which AAI is not

designed. She suggested that a useful addition to the Wiki would be a "frequently asked questions" section.

Mr. Van Den Bosch agreed that there is often misunderstanding of the AAI and active ageing concepts. E.g. increasing value of care indicators implies higher burden on older people. Mr. Lamura reacted that this ambiguity is coming from the lack of clearance in communicating AAI and normative interpretation of the results which should be avoided. Regarding the seminar itself, he added that the project team and the Expert group have achieved a lot in bringing different stakeholders together.

Ms. Zolyomi made several points regarding the seminar and AAI promotion: 1) it is essential to engage more policymakers and NGOs into such meetings. For this, sessions with local / regional policymakers presenting their experience of applying AAI can be useful; 2) given the number of papers combining AAI with some other measuring tools or indicators, it could be interesting to collect this information on the wiki; 3) promoting AAI without backing from EC would be difficult, since the EC support gives credibility to the work.

Ms. Perek-Białas pointed out that the evaluation board accepted papers that were critical of AAI which helped to launch discussions. She mentioned that out of four papers presented at the Workshop on sustainable application of AAI, two were from two provinces in Spain (Biscay Country and Navarra). Ms. Perek-Białas added that it would be useful to have another such seminar, and possibly organise a workshop for policymakers back to back.

Mr. Murillo Corzo stated that the maturity of the methodology has now been achieved, and that there is a need to target those who we want to convince and to "translate" the messages we want to convey in "their language". Ms. Bratanova pointed out that it is an efficient practice to have "champions" to drive the process. Determination to continue the efforts is key to achieving desired results.

Ms. Parent outlines several important questions that need to be answered in order to go forward: 1) it is necessary to identify ways for the Expert group to be involved further; 2) the DG EMPL Social Protection Committee (SPC) selects indicators for the Pension adequacy reports; there is a need for strong policy support to forward AAI with SPC (also given the last attempt failed); one way could be via the Pillar of Social Rights that has strong links with AAI that need to be made explicit; EU representatives could also promote the use of AAI at the Open-ended Working Group on Ageing; 3) it is important to decide what we want of AAI: to become a mandatory reporting tool like the Gender Equality Index, or to be kept as a tool that could be used by anyone who so desires.

Ms. Kharitonova together with Mr. Marchetti briefly presented the **further steps under the project**. The project could be extended by four months, till the end of August 2019. The activities planned include: a pilot study at subnational level in Romania with a meeting to discuss the outcomes (November 2018/April 2019); revision of AAI results for the Republic of Moldova (starting from December 2018); analytical report on AAI trends. National seminar potentially in Slovenia. Web-tool development (November 2018-March/April 2019). If project is extended, the idea is to organise a stakeholder meeting with capacity-building elements. At the meeting the above-mentioned web-tool will be launched, and its functionality explained to a wide range of stakeholders. Given that the web-tool is aimed at ensuring that any user could calculate AAI, this will be an important step towards a more independent AAI usage by a wider audience. Additionally, at the meeting an analytical report on the Active Ageing Index trends over the period 2008–2016 will be launched. A one-day meeting of the Expert group on AAI can be organised back-to-back to the stakeholder meeting.

A brief session of follow-up questions and answers followed. Namely, it was clarified that the stakeholders (for the stakeholder meeting) would include policymakers, researchers, international organisations, national statistical offices and civil society. The Chair reiterated that the visualisation tool will be developed by the European Commission's Joint Research Centre in cooperation with the project team. The participants made several suggestions on how to promote the stakeholder meeting and AAI in

general: prepare a short (up to 10 pages) online document which would provide highlights of AAI, case examples of its application; brief summary of results etc. (Mr. Howse); for the publicity, the book based on the research papers submitted for the second seminar could be useful, though given the labour and time intensity of this task it might be not easy to identify a lead editor (Mr. Zaidi); Mr. Murillo Corzo offered potential financial support for such publicity efforts.

The Chair thanked the participants and closed the meeting.