

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

## **I. Organisation and attendance**

The seventh meeting of the Expert Group on the Active Ageing Index (AAI) took place on 12–13 October 2017 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 16 participants (including one participant via phone).<sup>1</sup>

## **II. Objective**

The meeting aimed at discussing with the experts and getting their advice on most recently implemented research activities, including the studies of AAI results for different population groups in Germany and Poland; subnational application of AAI in Italy, Poland and Biscay province (Spain) etc. One of the key matters in focus was that of giving AAI more visibility outside of the project and research community. Organisation of the Second international seminar on AAI and further tasks under the third phase of the project were also discussed.<sup>2</sup>

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

The experts welcomed the research studies implemented under the AAI project in Germany and Poland that analysed the AAI results at national level for groups of older population defined by the criteria of the level of education, income, their combination as proxy for the socio-economic status, and by area of living (rural / urban). Both studies demonstrated the persisting (growing in the case of Poland) inequalities in active ageing experiences among population groups, especially defined by socio-economic status. The experts particularly appreciated that such studies provide evidence base for concrete measures by identifying the most vulnerable and / or disadvantaged groups of older persons. Another study will be implemented under the project activities in Italy in 2018.

Another direction of research appreciated by experts, but also their users, is subnational application of AAI: outcomes of the most recent waves of subnational calculation of AAI in Poland and the Biscay Province of Spain were presented and discussed at length. In both cases the studies were carried out at the request of the Government (national or regional level). Calculations at subnational level continues also in Italy (implemented by Istat). Their most recent results were presented at the national seminar “Active Ageing Index in Italy: use and policy implications” (11 May 2017, Ancona). The seminar in particular discussed the use of AAI as monitoring tool for the potential bill for promotion of active ageing in the Marche region.

The experts discussed at length possible ways to increase the policy relevance of AAI and its results. Two areas were agreed upon: aligning AAI with the United Nations 2030 Agenda for Sustainable Development and its goals (SDGs) and to explore the possibility of presenting AAI from the perspective of active ageing linked with long-term care (active ageing reducing costs of long-term care). Expansion of AAI project functionality was also discussed. The difficulty is in finding the balance between the possibilities of the project and the needs of users. By its conceptual design, the overall (aggregated) country-level AAI provides an integrated multidimensional insight to the general situation with the older persons’ potential realization. The AAI values are not supposed to be normative, and the function of comparability across countries/regions is secondary to the analysis of trends across time for a given country/region (monitoring function). The index points to problematic areas and even more so when more specific analysis is implemented (e.g. subnational, or for different population groups) and as such gives indications for

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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.

policymaking. However, AAI does not provide the policy advice per se: it is up to the users to carry out further analysis by linking policy measure to AAI results in their specific context.

At least two events are planned for 2018: a national seminar in Poland, and the Second international seminar on AAI, which will take place in Bilbao on 27-28 September 2018. The call for abstracts for the international seminar was launched in June 2017, and the deadline for abstract submission is 17 November. Experts discussed a number of options to increase participation of policymakers in the seminar, in particular: inviting a policymaker to be the key note speaker, holding special sessions bringing together all stakeholders, but focusing on topics of interest for policymakers; organisers should invite a targeted group of policymakers who will be given a concrete role to play during the event; at least some of the policymakers' interventions should be based on concrete examples of using AAI etc.

Given the acknowledged need for an online tool to demonstrate the AAI results but also to allow users calculating the index based on their own data, the project will engage a contractor to develop a web-tool in 2018. The experts made a number of suggestions on the potential tool, including the need to ensure the stability of the underlining methodology (weights), as well as the sustainability of the tool. Options to develop a video tutorial and look into making the tool more flexible in the future were also discussed.

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

### **Research**

- The research consultant continues to work on the most recent AAI results, an important challenge being to ensure comparability with the previous waves given changes in two EQLS indicators.
- 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 studies of AAI results for different groups of older population. One more such study will be implemented under the project.
- Several suggestions to implement AAI result analysis for different age groups were made.

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

- Given the need to increase the policy relevance of AAI, the experts suggested a number of potential action angles, including aligning AAI with SDGs and establishing a link of active ageing with long-term care, the former reducing costs of the latter.
- It was reiterated that AAI serves as non-normative tool which provides indications to problematic areas and leaves it up to its users to link the results to concrete policy measures; if calculated regularly the index serves to monitor the active ageing situation and policy implementation.
- The Second international seminar on AAI will be planned in a way to bring and involve policymakers and ensure interactive discussions among all stakeholders taking into account various suggestions made by the experts.
- A national seminar on AAI will take place in Poland in 2018.

### **Communication**

- The visualisation web-tool will be developed in 2018, it was suggested that it first demonstrates the already calculated results, and that the flexibility component is brought in at a later stage.
- Continue working on AAI presentation to relevant stakeholders taking into account the need to increase its policy relevance (see above).
- Continue working on wiki-space.

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

### DAY 1: 12 OCTOBER 2017

**Chair: Ana Carla Pereira, European Commission**

- 14:00 – 14:20 Welcome  
*Ana Carla Pereira, European Commission*  
*Andres Vikat, UNECE*
- 14:20 – 14:50 2016 AAI results and other updates on ongoing research work  
*Asghar Zaidi, University of Southampton*
- 14:50 – 15:00 Q&A
- 15:00 – 15:30 Analysis of AAI results for selected population groups in Germany  
*Jürgen Bauknecht, Fließener Fachhochschule Düsseldorf, University of Applied Sciences*  
*(via phone)*
- 15:30 – 15:40 Q&A
- 15:40 – 16:00 Coffee break**
- 16:00 – 16:30 Analysis of AAI results for selected population groups in Poland  
*Jolanta Perek-Białas, Warsaw School of Economics and Jagiellonian University,*  
*Krakow*
- 16:30 – 16:40 Q&A
- 16:40 – 17:30 **Discussion** of the outcomes of the two criteria-specific studies, suggestions for further work
- 17:30 – 17:50 Updates on the underlying surveys: European Quality of Life Survey 2016  
*Robert Anderson, Eurofound*
- 17:50 – 18:00 Q&A
- 18:00 – 18:10 Task Force on measuring old-age population in institutions: first developments  
*Andres Vikat, UNECE*
- 18:10 – 18:20 Q&A
- 18:20 Close of day one**

### DAY 2: 13 OCTOBER 2017

**Chair: Andres Vikat, UNECE**

- 09:15 – 09:30 Welcome and recap of day 1  
*Andres Vikat, UNECE*
- 09:30 – 09:50 Active ageing in Italy and National seminar on AAI in Ancona (May 2017)  
*Giovanni Lamura, INRCA*
- 09:50 – 10:00 Q&A

- Subnational application of AAI**
- 10:00 – 10:20 Subnational AAI in Poland: three waves  
*Jolanta Perek-Białas, Warsaw School of Economics and Jagiellonian University, Krakow*
- 10:20 – 10:40 Second wave of AAI in Biscay province  
*Sergio Murillo Corzo, Biscay Provincial Government*
- 10:40 – 12:00 Discussion of the presented results and of outreach to policymakers issues,  
**with a 20-minute Coffee break**
- Fourth UNECE Ministerial conference on ageing, 2017**
- 12:00 – 12:20 Main outcomes  
*Andres Vikat, UNECE*
- 12:20 – 12:40 Side event on AAI: Ways to realize the potential of living longer  
*Robert Anderson, Eurofound*
- 12:40 – 13:00 Q&A
- 13:00 – 14:00 Lunch**
- AAI in non-EU context**
- 14:00 – 14:25 AAI in the Russian Federation  
*Maria Varlamova, National Research University, Higher School of Economics (Moscow)*
- 14:25 – 14:40 Q&A
- Second International seminar on AAI, 27-28 September 2018**
- 14:40 – 15:00 Introduction  
*Sergio Murillo Corzo, Biscay Provincial Government*
- 15:00 – 15:10 Call for papers, abstract submission status etc.  
*Olga Kharitonova, UNECE*
- 15:10 – 15:40 Questions, suggestions
- 15:40 – 15:50 Updates on the editorial process  
*Asghar Zaidi, University of Southampton*
- 15:50 – 16:00 Overview of the further tasks under AAI-III  
*Olga Kharitonova, UNECE*
- 16:00 – 16:30 Summary  
*Andres Vikat, UNECE*
- 16:30 Close of the meeting**

## ANNEX 3. MINUTES OF THE EXPERT GROUP DISCUSSION

12 OCTOBER (14:00–18:20)

*Chair — Ms. Ana Carla Pereira (European Commission)*

The Chair welcomed the participants and opened the meeting.

The Chair pointed out that the topic of active ageing has been an important element of different policy initiatives by the European Commission since 2012 (the European year of active ageing and solidarity between generations). The most important of current such initiatives is the European Pillar of Social Rights aimed at delivering new and more effective rights for citizens and builds upon 20 key principles. A number of these principles are in the direct link with active ageing, e.g. right to resources that ensure living in dignity in old age; right to timely access to affordable, preventive and curative health care (including long-term care) of good quality; right to lifelong learning etc. The Pillar could be signed by the member States in November 2017. The Chair stressed that the work on AAI and the results to come need to be presented in a way for it to gain more visibility, and first of all in the policy context. One of the actions in this direction could be to make another introduction of AAI to the Social Protection Committee. The Chair asked experts to give concrete suggestions on the matter.

Mr. Andres Vikat (UNECE) welcomed the participants on behalf of UNECE. He briefly described the main activities implemented by UNECE since the Sixth meeting of the Expert group in 2016, including two research studies by institutional consultants on the AAI results for different population groups, national seminar in Italy, side-event on AAI at the UNECE Ministerial Conference on Ageing. Mr. Vikat particularly expressed his appreciation of continuous cooperation under the AAI project between UNECE and the University of Southampton, with Mr. Asghar Zaidi as lead researcher.

Mr. Asghar Zaidi (University of Southampton) gave an **overview of the tasks implemented** under the contract between the University of Southampton and UNECE (contract duration: 6 June 2017 to 6 March 2018). Mr. Zaidi thanked Mr. Robert Anderson (Eurofound) for his assistance in obtaining the microdata from the fourth wave of the European Quality of Life Survey (EQLS) before the official release for the calculations of the revised 2016 AAI. Out of six indicators based on EQLS, two (2.2 Care to children, grandchildren and 2.3 Care to older adults), have been modified in the fourth EQLS wave leading to issues with comparability with previous AAI results. Mr. Zaidi pointed out that the indicator 2.2 showed an increase while the 2.3 — a decrease, and added that the work on ensuring comparability is ongoing. Other indicators do not present difficulties in terms of comparability. At the same time, the European Social Survey (ESS) was not carried out regularly in some countries resulting in repeated usage of the same data from previous years (e.g. for Croatia, Greece, Luxembourg, Romania). Given all of the above, Mr. Zaidi warned that the interpretation of trends will require careful approach. The other tasks, including revision of the methodology description of the AAI indicators, exploring usage of the Survey on Health, Ageing and Retirement in Europe (SHARE), further work on “goalposts” are ongoing. He added that if all AAI indicators could be calculated based on a single survey, e.g. SHARE, this will allow to obtain AAI at individual level. An “individual AAI” would be a rich source of information which could be used for different policy purposes, as various groupings and comparisons among different population groups could be easily obtained based on such results.

Mr. Zaidi also agreed with the Chair on the importance of presenting AAI results to policymakers in a comprehensive and attractive manner.

Mr. Anderson commented that the respective questions for indicators 2.2 and 2.3 were modified to match the monitoring framework of the Beijing Platform for Action. Mr. Vikat suggested looking into isolation of the indicators for which the comparability throughout time cannot be ensured. Mr. Karel Van Den Bosch (Belgium Federal Planning Office) inquired if the retrospective revision of the index can be made, and if age-standardisation should be applied. Mr. Zaidi replied that it had been decided at the onset of the project



not to use age-standardisation to avoid complexity of the methodology and thus to allow for easier understanding of the results.

Ms. Anne-Sophie Parent (AGE Platform Europe) drew the attention of the participants to the fact that older population aged 75 and above are often out of data collection coverage. And it is this group that needs most of attention in terms of policy decisions on long-term care (LTC). Mr. Zaidi reminded that the majority of AAI indicators do not have an upper age limit, but agreed that it would be useful to analyse AAI results by age subgroups. Mr. Anderson stressed that data on older population aged 80 and above do not cover persons living in institutions who constitute a big part of this age group.

Mr. Giovanni Lamura (INRCA) pointed out that from the policy perspective it is of interest to connect LTC and active ageing: the latter helping to cut costs of the former. He added that given the lack of data on older population in institutions, there is no clear picture on population needing to be engaged in active ageing and population in need of LTC.

Ms. Eszter Zolyomi (European Centre for Social Welfare Policy and Research — ECV) stated that in order to make AAI results policy-relevant, it is important to look at AAI for different population groups.

Ms. Anne Sonnet (OECD) inquired if calculating AAI for clusters of countries is something to be pursued. Mr. Zaidi replied that country clustering could be used for further work on the goalposts.

Mr. Ettore Marchetti (European Commission) informed the participants that the field work under the seventh wave of SHARE is scheduled to finish by the end of October 2017, and the results are planned to be released by the end of 2018. He stressed that Ireland, the Netherlands and the United Kingdom are not covered by this wave.

The Chair summarised this part of discussion as follows:

- AAI results, especially the third domain, can be linked to LTC to make them more policy-relevant.
- The comparison throughout time is essential; the indicators for which the comparability cannot be ensured need to be isolated.
- No age-standardisation is needed.
- DG EMPL will keep the project team and the Expert group informed about developments in SHARE.

Mr. Jürgen Bauknecht (University of applied sciences of Dusseldorf) joined the meeting via phone and gave a detailed presentation on the research study of AAI results at national level for different population groups in Germany (carried out by the Technical University of Dortmund). The division of population groups was made based on three criteria: education, socio-economic status (SES; combination of educational attainment and income level), and place of residence. The analysis was carried out for four data points (2008, 2010, 2012 and 2014). Four data sources were used: German ageing survey, EQLS, ESS, and Microcensus. The results of the study show that there are inequalities in the extent of realisation of older persons' potential between population groups with different level of education and SES, while the results are not significantly different between urban and rural older population. The existing inequalities appear to stay at more or less same level through time.

Ms. Jolanta Perek-Bialas (Warsaw School of Economics and Jagiellonian University) gave a presentation on a similar study carried out for Poland by the Warsaw School of Economics. The population groups were divided by education, income, SES (combination of educational attainment and income level), sex, and place of living (urban/rural area). The calculation and analysis were implemented for five points in time (2007, 2009, 2011, 2013, and 2015). Four data sources were used: Labour Force Survey, EU statistics on income and living conditions (EU-SILC), Social Diagnosis, Time Use Survey. Similarly to German study results, older population in Poland also see inequalities in the level of their potential realisation depending on their education level, income and consequently SES. The most important divergence is in the last group:

population with the highest SES has twice as high AAI as those with the lowest SES. The differences between rural and urban population are less pronounced. The inequality seems to grow over time and mainly due to a more rapid increase in AAI level for the population with already higher AAI results.

Mr. Zaidi reminded about the study implemented by ECV in 2016 which looked at the inequalities in active ageing.<sup>4</sup>

Mr. Anderson pointed out that AAI usage gives “advantage” to younger groups given the strong weight of employment domain. Mr. Bauknecht added that the younger groups also have higher income because they are employed.

Mr. Bernd Marin mentioned that the impact of being employed on AAI results of groups by socio-economic status differs significantly across countries and asked if a cross-country comparison was carried out. Mr. Vikat replied that the goal of the studies was to illustrate the inequalities within a country and not to compare results among countries.

Ms. Zolyomi stated that wealth would be a better measurement than income, but data are limited. She reminded that ECV in its study used household income to divide the population into five groups. Ms. Parent stated that for comparison across countries usage of income as measurement is not enough, and that the access to health care and long-term care should be taken into account when assessing the financial situation of older persons. She also mentioned that there have been a lot of changes in access to care in the recent years. Mr. Bauknecht voiced his opinion that it is best to use subjective measures of the financial situation of older persons such as questions on how well they believe they make ends meet. Mr. Lamura pointed out that usage of subjective measures should take into account the wording of questions in surveys as they could lead to negative assessment subjective.

Mr. Sergio Murillo Corzo mentioned that the AAI in Biscay is highly dependent on the education level, and suggested looking at the Eurostat indicator “People at risk of poverty or social exclusion” for the evaluation of the socio-economic status.

Mr. Zaidi stressed that this kind of studies are carried out to provide policymakers with an evidence base to target policy areas where the biggest inequalities lie. He also informed the participants that according to studies on AAI at individual level, the inequalities are higher in the countries with lower AAI, which could mean that reducing the inequalities would bring up the AAI results. Mr. Zaidi also pointed out that the criteria-specific studies reflect the life-course inequalities, and that AAI should be used as identifier to point to where the improvements can be achieved by relevant policy interventions.

Mr. Lamura stated that such studies are worth pursuing. Statisticians and policymakers cooperating when using AAI results would ensure the double-check from both sides. This would provide more sound evidence base needed for policymakers. He added that the studies should provide a clear and focused message.

Ms. Parent suggested when presenting AAI results show right away the disaggregation by sex and other criteria (e.g. income), since average values for the older population do not reflect the real picture.

Mr. Marin pointed to the heterogeneity of countries’ situation in terms of poverty measurements and mentioned that it is important to make policymakers to use one “language”. Mr. Van den Bosch agreed and reminded that poverty indicators used to be not comparable, but now in the European Union they are, with the “At risk of poverty or social exclusion” (AROPE) rate being regularly measured and is now part of the common “language”. Mr. Van den Bosch raised a question on what policy advice could be given based on the outcomes of the presented or other similar research.

Mr. Anderson stressed that even without the comparison of the results, the similarities between the conclusions drawn from the German and Polish studies are obvious and not surprising, and that the trends

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<sup>4</sup>The study was presented at the Sixth meeting of the Expert group on AAI in 2016.

are more important for policymakers than cross-country comparison. He also suggested to implement age-period-cohort analysis, given the differences between age groups. Mr. Vikat pointed out that relative measurements could be compared across countries, e.g. ratio of the AAI results of a group with the highest income to those of a group with the lowest income could be used for cross-country comparison.

Mr. Murillo Corzo explained that breaking the AAI results into subgroups helps policymakers to understand what policies impact population, that using a longer time frame helps to see impact of policies; that technical work helps to defend the results as sound and strongly evidence-based; that AAI helps to remind that active ageing is much wider than some activities on pensions. He stressed that simplicity is important but not at the expense of robustness of the results.

Mr. Zaidi clarified that the aggregated AAI value serves for comparison across countries, while the domain scores show in which areas a country (region, locality etc.) is falling short; and the results by groups show what population categories are disadvantaged in terms of their potential realisation thus pointing to the policy interventions. He stressed that the AAI values do not identify what is behind the results, and added that one should not look only at the aggregated value, but at the very least at the domain scores as well.

Ms. Parent added that AAI gives an overview on what can be done. She stressed the importance of explicitly demonstrating that one indicator affects the others and thus to discourage working in silos in the area of active ageing. Ms. Parent suggested also mapping AAI indicators with levels of governance for intervening.

Ms. Zolyomi mentioned that there is a balance between a simple figure and complicated underlying basis. She added that AAI shows also trade-offs and overlaps between different aspects of active ageing. She suggested issuing an annual short policy brief highlighting specific areas, e.g. employment and social participation, focus on a gender perspective of the results etc.

Mr. Bauknecht expressed his opinion that it is worth to measure inequalities in specific indicators. He also stressed the importance of keeping in mind that some topics have good research coverage, such as care and work in older age.

Mr. Lamura gave an example of Italy stressing that there should be a constant measure that would give a clear picture at all times. He added that ageing includes contradictory matters that should be considered together, keeping in mind the trade-offs.

Mr. Vikat reminded that the AAI project is not about policy advice, but provides a tool to obtain an integrated picture for policies of active ageing.

Mr. Zaidi informed the participants that within the MOPACT project AAI is being used for policy briefs. He also gave an example of the American Association of Retired Persons (AARP) Liveability Index which links indicators to policy instruments, and suggested this is also done under the AAI project in the future.

Mr. Anderson gave a brief overview of the **most recent wave of EQLS** (2016). The target population was resident population 18+ year old living in private households in 28 countries of EU and 5 Candidate Countries. The minimum sample size was 1000. In this wave a web add-on was tried in four countries. The fourth wave of EQLS included a special module on public services. The preliminary results show that there are important differences in many of the AAI-related indicators among the different age groups (e.g. care provision, mental well-being, use of ICT etc.). The life satisfaction by age groups, though close at the EU level, varies by country groups. Overall, the inequalities persist within and across countries. In this manner, the quality of life for lowest income quartile has improved to a lesser extent than others; and many countries which scored high on most indicators before also did well in 2016, while those among the lowest performers also performed badly in 2016. Mr. Anderson particularly stressed the persisting disadvantaged position of informal care providers, and that measures should be taken to improve their situation.

**13 OCTOBER (9:15–16:30)**

*Chair — Mr. Andres Vikat (UNECE)*

The Chair briefly summarised main outcomes of the discussion of 12 October, notably on the following:

- Comparison of AAI results across countries and throughout time is an essential aspect of the work on the index which needs to be preserved.
- No age-standardisation is required.
- There is a great interest in the studies on AAI results for different population groups even if the results are not comparable across countries, and the project team is going to continue supporting such studies, as these provide clues on which areas policymakers need to focus in future.
- Main message from the two studies (Germany and Poland): those who are better-off see their AAI increasing at a higher pace, and the existing inequalities thus persist and grow.
- AAI gives an overall picture with intrinsic trade-offs and overlaps: more specific policy analysis is needed before going into action.

Mr. Vikat informed the Expert group about the new **UNECE Task Force on measuring old-age population in institutions** established in 2017. The work of the Task Force follows the UNECE Recommendations on Ageing-related Statistics suggesting measurement of institutional populations as one of the areas of future work. The Task Force includes 24 representatives from 19 countries and organisations (including Eurostat and OECD), and is led by the United Kingdom. Its objectives are to develop standard definitions and classifications of “institution” and “institutional populations” as they pertain to older people, and to provide guidelines for statistical offices on whether, when and how to include such populations in the production of statistics on ageing-related topics. The results of the work should be ready in June 2019, and will be submitted for the Conference of European Statisticians’ approval in the second half of 2019.

A number of issues were raised following the presentation. Ms. Perek-Bialas mentioned that in June 2018 there will be a conference in Krakow devoted to the official statistics, and suggested Task Force representatives to participate. Mr. Lamura inquired if there is any connection with the European Commission’s future work on LTC. Mr. Vikat pointed out that resolving issue of measuring / estimating older population in institutions will help to assess needs for LTC. Ms. Parent stated that it is essential to identify those who are in-between “safety nets”, including persons with most severe health problems who get excluded from LTC. She also stressed that there is a problem of LTC institutions cherry-picking most profitable clients, while the others are sent home. Mr. Vikat replied that this is to be kept in mind during the further work of the Task Force. Mr. Anderson pointed to the issue of population living in their communities, but still excluded from surveys. Mr. Vikat replied that proxy interviewing is done in some places, but stressed that it is not the scope of the Task Force work.

Mr. Lamura gave a presentation on the **national seminar** “Active Ageing Index in Italy: use and policy implications” held on 11 May 2017 in Ancona. The seminar was co-organised by the INRCA — National Institute of Health and Science on Ageing / Centre for Socio-Economic Research on Ageing, UNECE and co-funded by the European Commission. Mr. Lamura explained the Italian context as related to active ageing policies: while there are no laws on active ageing at national level at the moment, there are several examples at regional level (five regions already have such laws/strategies and in another five they are under discussion), and numerous initiatives at local level. INRCA implemented a mapping and assessment of active ageing legal framework at regional level. In the Marche region, where the seminar took place, a draft bill for promotion of active ageing was developed. The bill includes AAI for monitoring purposes. Presentations given at the seminar and discussion of AAI results at national level and regional levels for Italy fed the discussion on the necessity of such a bill for the region. The need for adoption of such a law was recognised by the participants and discussants, as was the usefulness of AAI as a tool for policymaking and monitoring. Mr. Lamura informed the group about possible cooperation between the Italian Statistical

Office and the Ministry of Labour and Social Policy for a project to adapt AAI for regional policy monitoring purposes.

Mr. Lamura reiterated the point on importance of linkage and distinction between active ageing and LTC in terms of developing efficient policies to address both phenomena, to channel funding for those policies, and stressed the need for a more structural understanding of commonalities and differences between the concepts and policies of active ageing (including prevention and health promotion) and those of LTC.

Ms. Parent stated that the AGE Platform Europe would like to apply AAI at regional level for the Madrid International Plan of Action on Ageing (MIPAA) monitoring. In this way, the AAI will be used to identify the areas of actions for policymakers. She reiterated that active ageing prevents LTC costs from expanding, and since the AAI measures active ageing policies efficiency, its application will also help to keep ageing-related costs under control. She gave an example of Denmark where care staff teach older persons to be more independent which would reduce the need for care, and thus its costs.

Mr. Zaidi made a suggestion to look into aligning AAI with the United Nations 2030 Agenda for Sustainable Development and its goals (SDGs). This will help to make AAI more easily taken on board by policymakers. Ms. Olga Kharitonova (UNECE) mentioned that the UNECE Population unit compiled national reports on MIPAA implementation and that it should be possible to identify all the countries who mentioned AAI in their report, and put the information together. She also mentioned that in 2015 the Population unit mapped its activities against the SDGs, and suggested to update it focusing on AAI only.

### **Subnational application of AAI**

Ms. Perek-Bialas gave a presentation on **three waves of calculations of AAI in Poland at regional level** (NUTS-2). All the waves of AAI calculations were implemented following official requests from the Government. She particularly mentioned good cooperation with the Central Statistical Office of Poland. Ms. Perek-Bialas informed the group that a law was adopted in Poland according to which the Government has to prepare an annual overview on the situation with ageing and older population, as well as that AAI was included as one of the monitoring indicators for the Polish Strategy for responsible development (2017–2020). The third wave of subnational AAI, based on 2015 data, was finalised in the end of December 2016. At the level of the overall index, the situation is not very divergent, which is not the case at the level of domains, where the most differing results are in the domain four; the differences are pronounced at the level of individual indicators as well.

She stressed that the purpose of subnational AAI is not to cross-compare regions, but rather to motivate regional policymakers to look at the areas where their regions do better / worse. In April 2018, Convent of regional presidents (independent of the Government) will meet to discuss senior and active ageing policy. Ms. Perek-Bialas will be a keynote speaker at this meeting, and she will report on the Polish regions' AAI.

The subnational Polish AAI was included in the national report on MIPAA implementation (<http://www.unece.org/pau/mipaareports2017.html>).

Ms. Maria Varlamova (National Research University, Higher School of Economics (Moscow)) asked if there was any analysis implemented of differences in AAI results among older persons within regions. Ms. Perek-Bialas clarified that though there are certainly such differences there are no data at this level. She also stressed the high level of decentralisation of ageing-related policies including employment strategies, which every region establishes for itself.

Mr. Sergio Murillo Corzo (Biscay Provincial Government) continued the topic of subnational application of AAI by presenting the **second wave** (2016 data) of the index **results for the Biscay Province**. The mandate for the AAI calculations was set in the Strategic Plan for Older People in Biscay. The target defined in the Plan is to increase Biscay Province AAI by 5 per cent by 2020. In cooperation with the Department of Sociology of the University of the Basque Country the calculation of AAI for 2016 and analysis of the obtained results, including in comparison with the results from 2014, were implemented.

The data were collected using secondary sources (LFS, Health survey, Demographic survey etc.) and the outcomes of an ad hoc survey among population aged 55 and above (with respondent number of 1,014). In comparison to the EU results, Biscay's overall AAI score is just above the EU-average, its first and second domain scores being lower than the EU-average, and third and fourth — higher. Certain changes in the AAI results are due to concrete policy measures, e.g. increase in employment as a result of better general situation with the employment and decrease in early retirement following the adoption of an act allowing receiving retirement pension benefits while continuing to work; or higher independent living domain score due to more targeted respective policy measures. Ms. Murillo Corzo also stated that there are important inequalities in AAI results among older persons with different levels of education which means that there is a need to review active ageing policies to target the groups with lower levels of education. Inequalities among older men and women remain low (though still exist).

Ms. Parent enquired about the reasons for the decrease in the life expectancy at age 55 and for the more pronounced differences in the healthy life expectancy among older people with different education level than in the life expectancy. Mr. Murillo Corzo pointed out that the life expectancy may be affected by the economic crisis, and also that the new wave of the healthy life expectancy calculation is expected in November (possibly with lower results than in 2014).

Ms. Varlamova asked if there was any age control carried out to analyse the strong positive correlation of the level of education and the AAI results. Mr. Murillo Corzo replied that such analysis was not implemented so far, but is planned. Ms. Sonnet enquired if the increase in employment could already be the result of the reforms implemented recently and stressed the need for qualitative analysis of the employment increase — to see if the older persons work longer out of necessity rather than because of new opportunities provided by the reforms. Mr. Murillo Corzo clarified that an increase in employment (0.5 percentage points) occurred during 2014–2015; he stressed that the employment increased more for those aged 65+ and highly skilled, which lowers probability of them being obliged to stay in the labour market.

Mr. Vikat asked Mr. Murillo Corzo what, from the point of view of a policymaker, he thinks AAI project could do differently and if the index responds to the users' needs. Mr. Murillo Corzo replied that AAI met the need for a monitoring tool for the Biscay regional strategic plan and stated that there should be a bridge built between research and policymaking not only in Biscay, but in general. One of the ways to do this is to point to the main issues affecting AAI results.

Mr. Lamura noted that both examples of use of AAI in Biscay and in Poland are inspiring and should encourage policymakers to follow these examples, and asked the Expert group about a possible strategy for policymaking outreach. He suggested to consider involving more policymakers into the work of the Expert group. Mr. Zaidi voiced his opinion that involvement of more policymakers should be outside of the Expert group meetings, possibly through holding workshops or seminars for policymakers to help understand how to use AAI for their purposes. Such workshops could be organised at the Second international seminar on AAI.

Regarding the question raised by Ms. Pereira on the previous day — presentation of AAI to the Social Protection Committee — it was agreed to wait for the right moment to do so, as currently the Committee is overloaded with other matters. Another direction of presenting AAI could be a peer review focused on the link of AAI to SDGs.

The discussion followed on the **further direction of project activities** in terms of the **functionality** niche of AAI and what components of the **added value** of the index should be highlighted in the further AAI promotion.

#### *Flexibility vs comparability*

As numerous examples show the application of AAI in different contexts requires certain adjustments of the index depending on the purpose of given analysis. Used in this way AAI loses in comparability.

However, there is no conflict per se. Mr. Zaidi stated that there is a need for EU-AAI which gives a message at this level, but it is up to each country to look in depth into their results.

#### *Individual indicators / scoreboard vs aggregated measure*

Mr. Zaidi reiterated that one of the most important AAI added value components is the aggregation of the 22 indicators as opposed to a scoreboard of indicators. As such AAI gives a general insight which is valuable to policymakers. The further analysis by domains and indicators — the next step to be taken by users — will provide evidence base for concrete policy measures.

It was generally agreed that even though individual indicators might be more easily integrated into existing measuring frameworks, AAI should preserve its nature of an aggregated measure. At the same time for the sake of making AAI attractive at different arenas, it could be presented in various ways, e.g. as 22 individual indicators bringing multidimensionality of issues (Mr. Zaidi), or by domains (Ms. Parent).

Another matter raised during the discussion was if it is up to the project to provide policy analysis to accompany the AAI results. Mr. Marchetti reminded that AAI provides indications as to where problems lie and is not supposed to provide indications to specific policy measures.

The Chair reminded about the monitoring function of AAI which should not be forgotten.

Several experts agreed that it is worth pursuing the idea of looking at active ageing as a means to reduce expenses on LTC, and present AAI from this perspective (Mr. Zaidi, Ms. Parent, Mr. Anderson). In this perspective the index could be presented to the DG for Economic and Financial Affairs that work on ageing report focusing on the economic and budgetary impact of ageing.

Mr. Lamura pointed out that there are different action directions that can be taken under the project. He stressed that there is a need for a political strategy to identify the right way of the AAI further implementation. Mr. Lamura added that the results of the work done so far have to be disseminated at all relevant arenas.

The Chair stressed that the needs of policymakers have changed since 2012 when the index was first introduced: today they need flexibility of the already well-developed tool. The Chair added that while at the UNECE side there is political support of AAI through the Working Group on Ageing, there is there is no clear path of action from the EU side, as there is no consolidated political support at the moment.

The Chair briefly summarised the main outcomes and highlights of the **Fourth UNECE Ministerial Conference on Ageing** held on 20–22 September 2017 in Lisbon, Portugal. In the course of preparation to the Conference the Population unit prepared the Synthesis report on the implementation of the Madrid International Plan of Action on Ageing (MIPAA) in the UNECE region between 2012 and 2017 based on the national reports submitted by the member States. The report includes the statistical annex consisting of demographic indicators and 22 indicators of AAI.<sup>5</sup>

The adoption of the Lisbon Ministerial Declaration “A Sustainable Society for All Ages: Realizing the potential of living longer” was one of the most important outcomes of the conference.<sup>6</sup> It sets three goals to achieve by 2022 (Recognizing the potential of older persons, Encouraging longer working life and ability to work, Ensuring ageing with dignity) and defines the actions to be taken. The member States also expressed their appreciation of the work of the UNECE Working Group on Ageing and acknowledge in the Declaration “*the need to explore the possibility of a resource-neutral transformation of the Working Group on Ageing to a standing sectoral committee without prejudice to the work of the UNECE in other areas of its mandate*”.

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<sup>5</sup> The Report is available from <http://www.unece.org/index.php?id=45245> (tab Documents). The country reports are available from <http://www.unece.org/pau/mipaareports2017.html>.

<sup>6</sup> The Declaration is available from <http://www.unece.org/population/ageing.html>.

The Declaration also demonstrates the countries' commitment to the United Nations 2030 Agenda and its Sustainable Development Goals and underlines the importance of monitoring and evaluating ageing-related policies “*on the basis of research and improved data collection, as specified in the UNECE Recommendations on Ageing-related Statistics*”.

Mr. Vikat also informed the Expert group about the side event on age-related statistics — “Better statistics for ageing” — held on 21 September in cooperation with the Swiss Federal Statistical Office.

Mr. Anderson gave a brief overview of the **side event “Active Ageing Index: ways to realize the potential of living longer”** which took place on 21 September 2017 at the Ministerial Conference on Ageing and which he chaired. The side-event brought together over 60 participants representing policymakers, researchers and civil society. It was organised in a form of a panel discussion and focused on the variety of ways AAI can be applied for decision making and monitoring of active ageing policies in different contexts, including national and subnational level in EU and in other UNECE countries.<sup>7</sup> Mr. Anderson stressed how AAI in its single measuring framework raises awareness of a variety of contributions that older persons make to economy and society.

Ms. Parent (one of the panellists at the side event) added that the representative of DG Justice who was present at the side event insisted on preserving the AAI structure as is, and voiced her opinion that the work on AAI should continue by implementing more in-depth analysis, such as subnational-level studies or AAI results disaggregated by age.

Mr. Zaidi (one of the panellists at the side event) raised his concern about the repeating question on the indicators of care provision (2.2 and 2.3): the countries with good systems of state-provided (formal) care risk having lower values of the respective indicators reflecting the level of informal care provision, and thus reduced contributions by older persons. Mr. Zaidi stressed that in his view AAI indicator values of a given country should not be compared to those of a country with very different systems of care provision, welfare etc. Ms. Parent stated that in case of Denmark, Finland or Sweden the “goalpost” for indicators 2.2 and 2.3 should rather be 0 than 100, as in these countries government is obligated to provide care facilitates. Mr. Lamura pointed out that one of the fundamental matters with the AAI interpretation is that it should not be presented and used as a normative tool. The AAI function is to deliver a message of the active ageing situation in all its aspects to stakeholders, and it is up to the latter to make decisions what to do with that message in a specific country context depending on the goals they need to achieve. Mr. Vikat agreed that the goalposts should be specific to the policy needs, and reminded of the complementarity of the indicators and domains of AAI (decrease in one indicator/domain can be compensated by an increase in another).

Ms. Varlamova gave a presentation on the four waves of **AAI calculated for the Russian Federation** (2010, 2012, 2014 and 2016). The population in the Russian Federation ages rapidly, and there is a persistent high gender gap in mortality: men die much younger than women (e.g. the probability of surviving to 60 years for men in 2014 is 67 per cent). The main legal document on ageing is the Strategy of action for older citizens up to 2025. The strategy is targeting the population aged 60 and above. In terms of AAI results for the Russian Federation, it has high scores in educational attainment, employment (keeping in mind the low retirement age and poor health), relative income, and use of ICT, while low results in (healthy) life expectancy, access to health and dental care, volunteering and lifelong learning (due to the lack of respective infrastructure), physical activity, mental well-being, independent living and physical safety. There are pronounced inequalities in many AAI indicator by sex, education and area of living (e.g. in life expectancy, lifelong learning, use of ICT etc.) She mentioned that there was no possibility for the moment to calculate comparable AAI at the regional level given the range of data from the official data sources. Ms. Varlamova mentioned that her research team advocates regular monitoring of situation of older persons, including active ageing components and considers AAI a suitable tool to be set at national

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<sup>7</sup> Presentations given at the side-event are available from <http://www.unece.org/index.php?id=45245> and <https://statswiki.unece.org/display/AAI/VIII.+Meetings+and+events>.



and regional levels, use of which would provide policymakers with a “checklist” to serve a basis for respective measures. Information on the individual-level AAI will give indications as to what can one do to improve their own personal AAI.

In response to Mr. Vikat’s question, Ms. Varlamova explained that the AAI-related research is implemented under general funding from the Government to the research institute, and respective ministries can ask for advice / consultation on the relevant matters. Mr. Marchetti asked about the place of active ageing in the Russian policies. Mr. Varlamova explained that at the moment the main focus of ageing-related policies is on older persons (their well-being) without taking into account life-course perspective.

Mr. Murillo Corzo gave an introductory presentation of the **Second international seminar on AAI** which will take place on 27-28 September 2018 at Bizkaia Aretoa (Conference Centre of the University of the Basque Country). The seminar will be co-hosted by the University of the Basque Country and the Biscay Provincial Government. Mr. Murillo Corzo shared the preliminary schedule of the so-called “Silver week” — a number of events organised during the week preceding 1 October 2018 — which could be linked to the seminar and organised in a way to attract more policymakers.

Ms. Kharitonova reported on the revised **schedule for the abstract submission and the work of the evaluation board**, and informed the participants about abstract submission status, as of 13 October. The new deadline for abstract submission — 17 November 2017 — was established after a discussion with the evaluation board Chair (Ms. Sarah Harper) and two of the board members (Ms. Perek-Białas and Mr. Zaidi) during the UNECE Ministerial Conference on Ageing in Lisbon. According to the revised schedule, the authors will be informed about acceptance of their abstracts by the end of 2017. The experts recommended sending a reminder about the abstract submission 10 days before the final deadline. Mr. Zaidi suggested Mr. Marin joins the evaluation board, subject to approval by the board Chair (Ms. Kharitonova is to consult Ms. Sarah Harper on the matter).

The discussion followed on the format of the seminar focusing on the ways to involve policymakers to a greater extent, including inviting a policymaker as a key note speaker, news articles prior to the seminar on topics related to AAI, a seminar / session on connections between AAI and SDGs, a session on measuring progress in active ageing in given countries compared with developments in AAI, parallel forum for policymakers etc. In the course of the discussion the following was agreed upon:

- invite a targeted group of policymakers (as opposed to inviting a wide circle of focal points in UNECE countries),
- hold sessions / events involving all stakeholders and not exclusively policymakers (integrate rather than divide); such sessions should include concrete examples and good practices presented by policymakers,
- ensure dynamic interactions during the sessions,
- assign exact specific roles to the invited policymakers / active contributors,
- ensure that presentations of AAI for policymakers focus on its concept and do not go into instrumental details.

Ms. Parent mentioned that there is a strong interest in AAI at subnational level by the Covenant on Demographic Change, and that its representatives should be invited to take active part in the seminar.

Mr. Zaidi gave an **update on the book** being prepared based on the papers from the first international seminar. The editing process is finalised, and the book should be issued by the end of 2017. Mr. Zaidi explained that the editing work took much more time and effort than it had been originally planned. Mr. Lamura suggested not to aim at both journal and a book after the second seminar. Ms. Zolyomi suggested to look into a possibility of an electronic book. It was agreed that a good idea would be to prepare a consolidated synthesis message (possibly, a policy brief) based on a number of selected papers, which could also be interesting for policymakers.

Ms. Kharitonova briefly informed the participants about the **upcoming activities under the project** including another study on analysis of AAI results for different population groups for which an institutional consultant will be engaged; development of guidelines on usage of proxies, for which an individual consultant will be hired. A national seminar will be organised in 2018 in Poland. The International seminar (covered above) will take place on 28-29 September 2018 most likely back-to-back with the eighth meeting of the Expert group. To develop a web-based visualisation tool for AAI, a contractor will be engaged. Ms. Kharitonova asked the participants to give their suggestions on the functionality of the future tool.

Several experts expressed their concern about a potential possibility to adjust weights on the web (including Mr. Zaidi, Mr. Vikat, Ms. Zolyomi). Main reason for that is that potential modification may lead to distorted results, which users might present as “official” since they would be coming directly from the AAI website. The website should contain the AAI results as calculated so far and possibility to introduce own data; the component of flexibility could be included at a later stage. Mr. Vikat suggested to look at other composite tools that have their websites, e.g. OECD better life index, Digital city index etc. Mr. Zaidi suggested that the website should include a function of cross-country comparability. Ms. Zolyomi mentioned that it might be useful to include a video-tutorial on the functionality of the index and the web-tool.

The next Expert group meeting is tentatively agreed to be held back-to-back with the Second international seminar on AAI in Bilbao.

Mr. Marchetti on behalf of Ms. Pereira made conclusion remarks regarding the need for more visualisation of AAI and bringing policy side closer to the index, and thanked the participants.

The Chair thanked the participants and closed the meeting.