Summary

The present report has been prepared pursuant to Economic and Social Council resolution 2018/6. It provides an overview of the modalities for the fourth review and appraisal of the implementation of the Madrid International Plan of Action on Ageing, 2002, as well as an update on relevant activities of the United Nations system on ageing. Opportunities to advance the implementation of the Madrid Plan of Action are also highlighted.
I. Introduction

1. In its resolution 2018/6, the Economic and Social Council requested the Secretary-General to submit to the Commission for Social Development at its fifty-eighth session, in 2020, a report on the modalities for the fourth review and appraisal of the implementation of the Madrid International Plan of Action on Ageing, 2002.

2. The Madrid Plan of Action was adopted by the Second World Assembly on Ageing, held in Madrid, from 8 to 12 April 2002. It contained a bold new agenda focused on three priority areas: older persons and development; advancing health and well-being into old age; and ensuring the existence of enabling and supportive environments. In particular, the Plan provided recognition that everyone, young and old, had a role to play in promoting solidarity between generations, in combating discrimination against older people and in building a future of security, opportunity and dignity for people of all ages. With 239 recommendations related to 35 objectives covering 18 issues consolidated under the priority areas above, the Madrid Plan of Action remains a crucial comprehensive framework for the development of policies and programmes concerning population ageing and older people.

3. The General Assembly, in its resolution 57/167, endorsed the Political Declaration and the Madrid International Plan of Action on Ageing, 2002; in its resolution 58/134, the Assembly acknowledged the road map for the implementation of the Plan (see A/58/160). The road map offers a practical framework to assist countries in setting national and international priorities and in selecting appropriate approaches to building an inclusive society for all ages.

4. The Madrid Plan of Action contains the provision that a systematic review of its implementation by Member States is essential for improving the quality of life of older persons and that the Commission for Social Development is to be responsible for the follow-up and appraisal of that implementation. In its resolution 2003/14, the Economic and Social Council invited Governments, the United Nations system and civil society to participate in a “bottom-up” approach to the review and appraisal of the implementation of the Plan of Action through, inter alia, the sharing of ideas, data collection and best practices.

5. The Commission for Social Development defined the principal approach to the review and appraisal of the implementation of the Madrid Plan of Action in its resolutions 42/1, 44/1 and 45/1, including a decision to undertake a review and appraisal every five years. The United Nations regional commissions, within their mandates, were requested to coordinate the implementation of the Madrid Plan of Action, its review and appraisal and the dissemination of information about the Plan at the regional level, as well as to convene regional review and appraisal activities and events. At the request of the Commission, guidelines to the bottom-up participatory approach for the review and appraisal exercise were prepared by the Department of the Economic and Social Affairs, through its programme on ageing. The guidelines contain an overview of four keys steps: (a) the identification of stakeholders and how to work with them; (b) how to review national policies and define priorities for action on ageing; (c) how to review the implementation of the Madrid Plan of Action with older persons through bottom-up participatory assessments; and (d) how to distil and analyse information at the national, regional and global levels.

6. Section II of the present report includes an overview of the first, second and third review and appraisal processes conducted by the Commission for Social Development.

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7. Section III contains an update on relevant regional and international activities on ageing within the United Nations system in the run-up to the fourth review and appraisal exercise.

8. In Section IV, prepared in consultation with focal points on ageing in the regional commissions, the important work carried out by those commissions in assisting Governments in the implementation and follow-up of the Madrid Plan of Action is highlighted, and opportunities to advance the implementation of the Plan are presented.

9. Section V contains the proposed calendar for the fourth review and appraisal exercise, as well as key recommendations for consideration by the Commission.

II. Overview of the first, second and third review and appraisal of the implementation of the Madrid International Plan of Action on Ageing and their continuing relevance for the fourth review and appraisal exercise

10. More than 15 years have passed since the Second World Assembly on Ageing set out a comprehensive vision and landmark document for building an inclusive society for all ages in the Madrid International Plan of Action on Ageing.

11. Where ageing may once have been a stand-alone issue or an afterthought, the unprecedented demographic transformation taking place and its profound impact on every aspect of individual, community, national and international life were recognized in the Madrid Plan of Action. While Governments adopting the Plan celebrated the revolution in longevity and challenged society to promote increased opportunities for older persons, they also urged society to transform the opportunities and quality of life of men and women as they aged by examining national policies from a developmental perspective and with a life course approach, thus building the foundation for an inclusive society for all ages. Through the Plan, they highlighted economic, social and gender inequalities faced by older persons, raised awareness of exclusionary practices often rooted in negative stereotypes that depicted older persons as weak and dependent and called for better reflection of their contributions, strengths, resourcefulness and humanity.

12. The 2030 Agenda for Sustainable Development provided an opportunity to further anchor the issue of ageing in the global development agenda. With older persons estimated to globally outnumber youth by 2030, global ageing is poised to shape the prospects for achieving the Sustainable Development Goals, with important and far-reaching implications across all spheres of society. Efforts to implement the Madrid Plan of Action will therefore contribute to accelerating progress towards the realization of the 2030 Agenda.

13. Implementation of the Madrid Plan of Action is a continuous and dynamic process that goes hand-in-hand with its review and appraisal. Those processes are interdependent and continuously evolving, given that the review and appraisal exercise generates knowledge for policymakers, supports action and promotes public awareness. Ensuring a bottom-up participatory approach to reviewing and appraising the implementation of the Madrid Plan of Action necessitates the creation of effective channels and mechanisms for participation and dialogue with various stakeholders and with older people themselves, to give them a voice in decisions directly affecting them.

14. The review and appraisal cycle commences at the national level and ascends to the regional level. The United Nations regional commissions play a critical role in supporting the review and appraisal exercise as they facilitate intraregional cooperation, provide regional forums and undertake regional reviews to ensure that the outcomes of intergovernmental processes at the regional level inform the global review at the end of each cycle.

15. Since its endorsement by the General Assembly in 2002, the Madrid Plan of Action has undergone three review and appraisal cycles, one every five years (see figure 1). The first review and appraisal exercise, covering the period 2003–2007, was conducted in 2008, at the forty-sixth session of the Commission for Social Development; the second, covering the period 2008–2012, was conducted in 2013, at the Commission’s fifty-first session; and the third, covering the period 2013–2017, was conducted in 2018, at its fifty-sixth session.

Figure 1
Timeline of the review and appraisal of the implementation of the Madrid Plan of Action

16. As part of the procedures for the review and appraisal as laid out by the Commission for Social Development, regional commissions adopt individualized approaches to the review and appraisal exercise that are tailored to their respective operational realities. There has been a steady upward trend in the participation of Member States in the review and appraisal exercise, with a dip during the second cycle due to exceptionally low participation in the Africa region (see figure 2). The engagement of two thirds of Member States in the most recent review and appraisal cycle attest to the growing importance of the Madrid Plan of Action as the international policy framework on ageing.
17. In all three review and appraisal cycles, while welcoming the progress made, regional commissions continued to report significant challenges in monitoring the implementation of the Madrid Plan of Action. Those challenges include: (a) the lack of data availability, in particular age-disaggregated data, in many countries; (b) the inability to carry out comparative analyses between countries in several regions, owing to the absence of agreed indicators at the regional level; (c) difficulties in gathering inputs from all relevant ministries where coordination units on ageing do not exist at the national level; and (d) the lack of capacity and limited national institutional frameworks in some countries and regions to engage on or respond to the review and appraisal process at the national level.

III. Update on relevant regional and international activities on ageing within the United Nations system, in the run-up to the fourth review and appraisal of the implementation of the Madrid Plan of Action

18. The Economic Commission for Africa is organizing a regional conference on ageing, to be held in Addis Ababa, in the first half of 2020, in partnership with HelpAge International and the African Union Commission. The conference will provide a venue for Member States to discuss and share initial information regarding the preparation of timelines for the fourth review and appraisal of the implementation of the Madrid Plan of Action. The regional review report is expected to be finalized by mid-2022.

19. States members of the Economic Commission for Europe addressed the fourth review and appraisal process at the twelfth meeting of the Standing Working Group on Ageing, held in November 2019. In the second half of 2020, guidelines for national reports will be issued by the Bureau of the Working Group, with submissions expected at the end of 2021. The regional synthesis report should be finalized in the second quarter of 2022, with the regional conference to be held in the second half of 2022.
20. With regard to the region covered by the Economic Commission for Latin America and the Caribbean, an informal coordination meeting was held in October 2019 with delegations from Argentina, Chile, Costa Rica and Uruguay to prepare a timeline proposal towards the organization of a regional conference, to be held in 2022. Regional preparatory meetings are planned, with the objective of agreeing on the review and appraisal process at the regional level. The regional commission will support its member States in the preparation of national reports during 2021. That work will culminate in 2022 with the holding of the fifth Regional Intergovernmental Conference on Ageing and the Rights of Older Persons in Latin America and the Caribbean. Conference participants will seek to analyse the results achieved in the implementation of the Madrid Plan of Action, as well as other regional commitments, including the Montevideo Consensus on Population and Development and the Inter-American Convention on Protecting the Human Rights of Older Persons.

21. The Economic and Social Commission for Asia and the Pacific is preparing an overview of existing policies and developing a dashboard of statistical indicators to measure progress in the implementation of the Madrid Plan of Action, to be closely linked to the Sustainable Development Goal indicators. The dashboard will be populated with data provided by countries in the region. That work is expected to be completed by mid-2021. The regional commission will also issue a working paper on key elements of ageing policies, in line with the Plan, to provide a contrast with existing policies and identify policy gaps. A regional progress report on the implementation of the Plan will be prepared in the first half of 2022, as input to the intergovernmental meeting to be held in the second half of that year.

22. In 2018, the Economic and Social Commission for Western Asia published a report on the prospects of ageing with dignity in the Arab region, in which it provided a situation analysis of the socioeconomic conditions of older persons and their prospects in the region for the period 2030–2050. In its fourth review and appraisal cycle on the implementation of the Madrid Plan of Action, the regional commission plans to focus on ensuring an inclusive review process by engaging civil society and other stakeholders in the region.

23. In the Madrid Plan of Action, the importance of research, data collection and analysis in supporting policy and programme development is stressed as a key priority for national Governments and international assistance (see E/CN.3/2018/19). The Titchfield Group on ageing-related statistics and age-disaggregated data, established in 2018 by the Statistical Commission, promotes and advances that priority by aiming to develop standardized tools and methods for producing data disaggregated by age and ageing-related data. Led by national statistical institutes, the Titchfield Group includes the participation of United Nations agencies, international non-governmental organizations, the Department for International Development of the United Kingdom of Great Britain and Northern Ireland and academia. The Group held its second technical meeting in the Republic of Korea, in June 2019, at which representatives of national statistical offices and other relevant international institutions were brought together with the following objectives: (a) to reflect on the Group objectives, reviewing progress of work and identifying next steps; (b) to provide an opportunity for representatives to work together to advance priority work strands through practical workshops; (c) to build international collaboration on the topic of ageing related data; and (d) to increase knowledge within the Group of potential opportunities for improving data on ageing through country examples.

24. As stated in the Madrid Plan of Action, health promotion activities and equal access by older persons to health care and services is the cornerstone of healthy ageing. Healthy ageing is a timely issue, as exemplified in the Group of 20 Osaka Leaders’ Declaration, in which G20 leaders recognized the importance of promoting a healthy and active ageing society. In the Global strategy and action plan on ageing
and health, adopted by the World Health Organization in 2016, Member States provided a policy framework that aligns the global response to population ageing with the 2030 Agenda. In the strategy, Member States committed themselves to preparing for a decade of concerted global action, the Decade of Healthy Ageing 2020–2030.\(^4\)

In preparation for the Decade, the World Health Organization has: (a) conducted a survey, to which 160 respondents from 81 countries responded, to identify the priority issues and outcomes for the Decade; (b) revised lessons learned from previous United Nations decades to identify challenges and factors for success; (c) worked closely with Member States to harness political opportunities; (d) established an online platform to share and disseminate information on the Decade;\(^5\) and (e) sought open input, comments, revisions and additions, through online consultation, on the zero-draft proposal for the Decade.

**IV. Opportunities to advance the implementation of the Madrid Plan of Action**

**A. Emerging issues**

**Long-term care**

25. Long-term care and the way in which it is provided is vital to maintaining the health and well-being of older persons and to ensuring a high quality of life, by enabling them to live more independently, with dignity and choice, personal safety and the ability to participate in their communities and society. While many older persons enjoy relatively good health into their later years, others may experience a higher risk of chronic disease and other health risk factors.\(^6\) Population ageing, combined with growing longevity rates, often results in an increase of both the incidence of age-related frailties and the need for more extended long-term care.

26. The issue of long-term care has been rising on the agendas of many Member States, including in developing countries. Nevertheless, there is prevailing misinformation about the availability of resources for the care of older persons, which tends to be associated with assumptions about the extent of government support for long-term care (see A/73/213). According to evidence, many older persons worldwide are without access to formal long-term care services, with long-term care systems often characterized by extremely low levels of public expenditure, high out-of-pocket costs and shortages of formal care workers. Some 48 per cent of the global population is not covered by any type of nationally legislated provision of services, and only 5.6 per cent of people worldwide are covered by legislation that provides long-term care coverage for all.\(^7\)

27. The demand for long-term care, both paid and unpaid, will grow as the number of older persons increases. In the context of the care economy, more efforts are needed to promote long-term care, not only as a necessity, but also as a positive social and economic investment, a source of employment and a contribution to sustainable development.


\(^5\) Available at [www.who.int/ageing/decade-of-healthy-ageing](http://www.who.int/ageing/decade-of-healthy-ageing).


28. Actions to establish and strengthen care services and care systems must reflect the importance of balancing the quality and affordability of long-term care with decent work for caregivers, many of whom are migrant workers or older women, while accounting for the gender-related nature of the provision of both paid and unpaid care (ibid.). Where older persons, in particular older women, are providers of unpaid care to other older persons, policies should ensure that they receive social protection for their contributions.

**Future of work**

29. Older persons should benefit from changes associated with new employment trends. Societies and economies can gain from the talent, experiences and contributions of older workers who wish to remain active, and innovative policies that expand older persons’ choices in the labour market promote their effective inclusion. Possible interventions to support older persons include flexible working arrangements, increased opportunities for partial retirement and adapting jobs and workplaces to the differential needs of older persons, in particular those with disabilities. Access to lifelong learning is also central to enabling older workers’ continued engagement with the labour market.

30. Policies with regard to active employment in old age and active ageing must be accompanied by strong social protection systems. In many instances, older persons work out of necessity until they are no longer able to continue. High levels of informality and lack of access to decent employment often result in workers with no entitlement to adequate pensions once they reach retirement. Adequate social protection systems need to be in place to ensure that persons above retirement age can stop working if they wish to, while maintaining a good quality of life, and should respond to the needs and challenges of vulnerable groups within the population of older persons, including older women.

**Older persons in emergency situations**

31. Emergency crises are increasing worldwide, and older persons remain one of the most affected groups. Evidence shows that the specific needs and contributions of older persons are often overlooked in emergency relief systems, which aggravates the risks they face and diminishes their capacity to respond and adapt to disasters (A/74/170 and A/74/170/Corr.1).

32. Older persons report significant barriers in gaining access to humanitarian assistance. For instance, they are often discriminated against in terms of access to medical services in emergency contexts. Delivery systems can discriminate against older persons by establishing age caps that discontinue support at a particular age in their programmes. In addition, the multiple and intersecting forms of discrimination experienced by older women can be exacerbated during emergencies and aggravate their vulnerabilities.

33. As the world’s population grows older and the number of emergency crises increases, correspondingly large numbers of older persons will be affected by humanitarian emergencies, especially in developing regions, where the pace of population ageing is advancing the fastest. Despite some progress achieved, much remains to be done to have an age-inclusive emergency response, which involves, inter alia, effectively including older persons in emergency planning and response.

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frameworks at all levels, adequately training humanitarian actors in the rights of older persons in emergency settings and ensuring the collection and use of data, disaggregated by age, sex and disability, in all phases of humanitarian emergencies.

**Older women**

34. Despite outnumbering men in the world’s older population, owing to the fact that women’s life expectancy at birth exceeds that of men (by 4.8 years, globally, for the period 2015–2020)\(^\text{10}\) and to the increased traction gained by actions to address gender inequalities and promote the empowerment of women in recent years, older women and their specific experiences and challenges are often overlooked in key policy discussions and decision-making processes.

35. Whereas both older women and men encounter age-based discrimination and experience distinct challenges as a population group, women and men experience old age differently. Gender inequalities faced throughout the lifespan exacerbate vulnerabilities experienced by older women (see CEDAW/C/GC/27). For instance, the unequal distribution and disproportionate amount of unpaid care and domestic work that women provide over the course of their lives frequently result in economic vulnerabilities in old age for women.\(^\text{11}\) Furthermore, older women face multiple forms of abuse and violence, with such violence occurring at the intersection of different types of discrimination.

36. Forms of discrimination against older women include negative stereotypes that reflect consideration of women in old age as being unimportant; limited access to services, entitlements, decision-making and uneven participation in public life; lack of access to age-appropriate health care; lower earning capacity; and discriminatory gender-based laws and customs that apply to property and inheritance (see A/70/185). Older women experience multidimensional discrimination whereby age is a compounding factor with other forms of discrimination, including those based on gender, ethnicity, disability, poverty level and marital and family status.

37. Despite evidence highlighting the distinct challenges and forms of discrimination faced by older women, less than 3 per cent of concerns, observations and recommendations made in the last 20 years by the Committee on the Elimination of Discrimination against Women were related to older persons.\(^\text{12}\) Efforts need to be devoted to ensuring that the gender perspective is fully integrated in all policies, programmes and legislation, so that the needs and experiences of older women are considered and the multiple and intersecting forms of discrimination faced by older women are prevented. Further research is therefore needed to better understand and address the intersecting inequalities faced by women in old age.

**Opportunities identified at the regional level**

38. The United Nations regional commissions have identified additional emerging issues at the regional level, including a need for the following actions:

(a) Generate significant, renewed momentum for advancing ageing issues, especially in regions with youthful populations and multiple competing development needs;

\(^{10}\) *World Population Ageing 2019: Highlights* (United Nations publication, Sales No. E. 20.XIII.5).


(b) Establish appropriate links between the Madrid Plan of Action, ageing-related policies, the 2030 Agenda and other relevant commitments, such as the Inter-American Convention on Protecting the Human Rights of Older Persons;

(c) Rethink social protection systems in the context of rapid population ageing and growing inequalities and ensure an inclusive approach to addressing the needs and situations of older persons;

(d) Promote lifelong learning opportunities, in order to guarantee equal access to decent work by older persons and to ensure that people can remain productive and competitive in the labour market throughout the course of their lives;

(e) Increase access to information and communications technology and promote digital literacy of older persons, as such technology can promote their independence and improve their well-being;

(f) Ensure that older persons can benefit from the fast-growing frontier technologies, as robotics and artificial intelligence, which have the potential to improve healthcare, accessibility and transportation systems and increase social connections;

(g) Strengthen health policies and programmes for the prevention, detection, diagnosis, treatment and care of non-communicable diseases, including Alzheimer’s disease and dementia, bearing in mind that population ageing is among the major factors contributing to the rising incidence and prevalence of such diseases;

(h) Ensure access by older persons to sexual health care and raise awareness of the realities faced by older persons as a result of their sexual orientation.

B. Participation of civil society

39. Effective collaboration between Governments and other stakeholders, including civil society, is essential to the implementation of the Madrid Plan of Action. The facilitation of partnerships is, in fact, identified as a central theme of the Plan. In its resolution 2003/14, the Economic and Social Council invited Governments, the United Nations system and civil society to participate in a “bottom-up” approach to the review and appraisal of that implementation.

40. The role of civil society in the review and appraisal of the implementation of the Madrid Plan of Action, an essential element of the aforementioned bottom-up approach, continues to grow and is key to understanding the impact of policies on the lives of different groups of older persons, especially at the local level. In addition, many civil society organizations promote a bottom-up and participatory approach in their work, therefore supporting the implementation of the Plan.

41. In 2019, The Global Alliance for the Rights of Older People held its first regional meetings with a view to growing the movement and nurturing collaboration, to build the capacity of its members. The workshops followed a bottom-up approach by working directly with older persons to forge coalitions at the national and regional levels and jointly plan for upcoming events. HelpAge International developed a new organizational strategy for 2030, aimed at delivering an impact for older people, over the course of the coming decade, through the promotion of improved well-being, dignity and voice. The organization will seek to achieve its objectives by promoting older people as independent actors and change agents, as well as leaders in all the different forums and levels where change can happen, and by working to address barriers, such as attitudes, behaviours and institutional practices, that foster discrimination against older people.

42. AARP works with entrepreneurs, investors, academics and the private sector to spark new “age-tech” solutions aimed at empowering older people as they age. Through
AARP Innovation Labs, the organization continues to create possibilities by helping older persons to make informed decisions and choices about their lives in the categories of health, wealth and self. In addition, the new branding and strategy of the International Federation on Ageing, reinforces the essence of the Madrid Plan of Action by placing an emphasis on the rights-based approach. The strategy advocates policies that build an environment for older people to do what they value, using a person-centred philosophy. With older persons as its primary focus, the organization depends on collaborations and partnerships across sectors and disciplines, with the goal of accelerating advocacy and policy development.

43. The recently established Stakeholder Group onAgeing in Africa unites a diverse range of civil society experts and is well positioned to engage with and influence policymakers, including through contributions to United Nations processes and procedures by providing valuable expertise and understanding from a local context. The active role taken by the Group ensures that issues of relevance to older persons are considered in the implementation of international and regional frameworks and, most importantly, that no one is left behind, including older Africans.

C. Relationship between development, social policy and the human rights of older persons

44. In its resolution 2018/6, the Economic and Social Council requested the Secretary-General to address the relationship between development, social policy and the human rights of older persons to, inter alia, better inform the future of work of relevant United Nations entities and bodies, including the Open-ended Working Group on Ageing of the General Assembly, for the purpose of strengthening the protection of the human rights of older persons.

45. In adopting the Madrid Plan of Action and the Political Declaration, Governments agreed for the first time to link questions of ageing to other frameworks of social and economic development and human rights and recognized the need to promote both development and human rights in order to further the vision for an inclusive society for all ages.

46. Investing in social policies with a view to facilitating the full realization of the right to development will advance not only the implementation of the Madrid Plan of Action, but also the achievement of the Sustainable Development Goals and targets of the 2030 Agenda.

V. Proposed calendar for the fourth review and appraisal of the implementation of the Madrid Plan of Action and key recommendations

47. In keeping with the mandated timeline for the fourth five-year review and appraisal, the proposed calendar could be as follows (see figure 3):

- 2020: The Commission, at its fifty-eighth session, decides on the modalities
- 2021: National reviews and appraisals
- 2022: Regional review processes
- 2023: Global review by the Commission for Social Development at its sixty-first session

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48. As the Second World Assembly on Ageing approaches its 20-year milestone, the fourth review and appraisal exercise provides a unique opportunity to generate renewed momentum for international action to advance the ageing agenda.

49. The Commission for Social Development may wish:

(a) To request Member States to endorse the proposed calendar for the fourth cycle of review and appraisal of the implementation of the Madrid International Plan of Action on Ageing, 2002;

(b) To request Member States to undertake a national review and appraisal process, by identifying actions taken since the third review and appraisal in 2018;

(c) To request Member States to prioritize and commit adequate resources for the participation of civil society in the planning and evaluation processes of the review and appraisal;

(d) To request regional commissions to continue to facilitate, including through their intergovernmental bodies and in collaboration with relevant United Nations entities and civil society organizations, the fourth review and appraisal exercise at the regional level by:

(i) Providing assistance to Member States, upon request, in the organization of their national review and appraisal exercises;

(ii) Organizing regional review meetings;

(iii) Promoting networking and the sharing of information and experiences;

(iv) Assisting Member States, upon request, in the implementation of the outcomes of the regional reviews;

(e) Request the United Nations system to support national efforts to improve the availability of the necessary data, disaggregated by relevant factors, and the indicators required for the review and appraisal exercise by providing, upon request, technical assistance for national capacity-building;

(f) Encourage the United Nations to take concrete measures to improve its institutional capacity to implement the Madrid Plan of Action and to mainstream ageing issues into the programming and mandates of system agencies, funds and programmes.