1. Brief Background to Ageing in Europe

In Western Europe, there are at present about 25 persons over 65 for every 100 persons of working age (15 to 64 years); and this number is forecasted to almost double by 2050. In other words, if there are now between four and five people of working age for every retired person in Western Europe, in just over 45 years there will be just over two. Similar figures and dynamics could be seen and forecasted for both Northern and Southern Europe, notwithstanding sub-regional and national differences. Figures such as these have been the source of many of the disturbing headlines of the past few years, especially in the economically advanced countries.

Eastern Europe would appear to be, and remain for some time, in a slightly more favourable demographic position. In the early 1990s, the countries of Eastern Europe and the Former Soviet Union (CEE) were home to only 8 percent of the world’s population but more than 13 percent of the older people worldwide. The share of older people is projected to rise in all CEE countries over the next three decades. While not all are «poor» as economically defined, older persons are nevertheless one of the major social groups in poverty in many CEE countries. Their vulnerability stems from a variety of sources: many are socially isolated, most of the oldest are women, and destitution is on the rise. The transition, particularly in the former Soviet Union states, has been difficult, and a sense of powerlessness prevails among older generations.

Many countries of the ECE region are experiencing a «baby boom» cohort. When the «boomers» in a given country reach retirement age, there will be a substantial increase in the old age dependency ratio, as the cohorts following them, are distinctly smaller reflecting significant post baby boom declines in fertility. This «one-off», but protracted, impact should be seen in social and economic contexts. Fears about the future course of old age dependency ratios have been the first impetus for discussions of reform of pension systems. The basic demographic factors, however, are not the only reasons why there is a concern about the financing of public pension systems at current tax rates. The increase in the system dependency ratio, that is the ratio of those receiving public pensions, at whatever age, to those contributing to them, has greatly compounded the problem. For the advanced market economies the chief factor has been the persistent trend towards early retirement, particularly marked between 1960 and 1985. This has been influenced by the incentives offered by pension systems themselves, as well as by incentives to firms to retire older, and often more expensive, workers when growth rates of output are relatively low.

A related, and also often expressed in alarmist tone, concern is the projected significant increase in the cost of health and long term care of the older European population.

2. Overview of Research Issues on Ageing in Europe

2.1. General Considerations

The workshop considered that priorities for research needed to be informed in the first instance by reviewing what research is currently being undertaken in the area. Existing data banks containing information relevant to ageing and development should be identified and utilized, and the data from these sources should be more extensively disaggregated by sex and age.

Funds have to be allocated by national and European authorities specifically to support research on ageing. In addition national research plans should be developed within an overall regional framework taking into account the specific characteristics of ageing in Europe. Account should also be taken of the heterogeneity among ageing popula-
tions in Europe. For these purposes, goals for priority policy related research should be set by individual countries and regional authorities, and the need for ‘grass roots’ research should be emphasized.

Gender issues, particularly those related to older women, need to be given special attention.

2.2. Research, Policy and Politics

It should be recognised that most European research is undertaken in universities and not by governments. Thus the link between policy and research on ageing, that is often missing, has to be established. The relationships between research, policy and politics on ageing need to be explicitly addressed, including evaluation of the impact of research on policy and political outcomes.

Consideration needs to be given to how politicians, including policy makers, as well as the wider public can be convinced of the importance of research on ageing. As political activity of older generations is growing, and older people command a large number of votes, research should examine political aspects of ageing in Europe. There is also a question of ‘time horizon’: while the political cycle of governments does not usually exceed 5 to 10 years, the issues of ageing and related research have a larger time frame.

Specific frameworks for policy related research - similar to the UNECE Regional Implementation Strategy - need to be identified or initiated, as necessary. It is equally important to integrate an age dimension into policy related research in social, economic, cultural and other relevant areas.

2.3. Priority Areas for Research

The following research areas merit consideration as general research priorities:

- Physical and mental health. Determinants of active ageing.
- Economic aspects of age-associated disorders, including relative benefits of spending on curative versus preventative activities. In general evidence of highest potential cost effectiveness should be taken into account in allocating limited funding resources for ageing related research.
- “Oldest old”, including studying genetic and environmental determinants of individual longevity.
- Variations in care systems’ delivery and practices; including effects of migration and role of cultural traditions.
- Health care costs, including restriction of access for older persons to relatively expensive procedures (age discrimination).
- The continuing importance of family in care giving and intergenerational relationships.
- General population dynamics and its implications for age structure of society.
- Quality of life vis-a-vis prolongation of life. What defines and influences quality of life in old age?
- Pharmacological interventions, including those claimed to influence ageing processes and impact upon longevity and quality of life. Evaluation of soft interventions, such as reminiscence techniques, as well as pharmaceuticals. The effects of polypharmacy.

3. Identifying Research Priorities on Ageing in Europe

3.1. Regional Implementation Strategy for Europe

The participants agreed that priorities for research on ageing in Europe should be linked to the Regional Implementation Strategy for the Madrid International Plan of Action on Ageing, which was adopted by the United Nations Economic Commission for Europe (UNECE) Regional Ministerial Conference on Ageing (Berlin, September 2002). The Regional Implementation Strategy for Europe includes ten commitments, namely:

1. To mainstream ageing in all policy fields with the aim of bringing societies and economies into harmony with the demographic change to achieve a society for all ages;
2. To ensure full integration and participation of older persons in society;
3. To promote equitable and sustainable economic growth in response to population ageing;
4. To adjust social protection systems in response to demographic changes and their social and economic consequences;
5. To enable labour markets to respond to the economic and social consequences of population ageing;
6. To promote life-long learning and adapt the educational system in order to meet the changing economic, social and demographic conditions;
7. To strive to ensure quality of life at all ages and maintain independent living including health and well-being;
8. To mainstream a gender approach in an ageing society;
9. To support families that provide care for older persons and promote intergenerational and intra-generational solidarity among their members;

1 http://www.unece.org/ead/pau/age/berl/berl_list_docs.htm
10. To promote the implementation and follow-up of the regional implementation strategy through regional cooperation.

3.2. Specific Priorities

The workshop considered the key issues and priorities for research under the first nine commitments as follows.

3.2.1. To mainstream ageing in all policy fields with the aim of bringing societies and economies into harmony with the demographic change to achieve a society for all ages (Commitment 1).

Research that could support the fulfilment of this commitment should strive to answer the following questions:

- What are the legal mechanisms that will facilitate the mainstreaming of older people in society?
- Who should be responsible for the ageing process of the society at large, e.g., government, NGO, private sector, family, community etc?
- What social institutions need to change or adapt to the realities of an ageing society?
- How do we «market» ageing? How do we make ageing 'sexy'?
- How can governments be convinced of the value of social inclusion of older persons?
- Which arguments can be used to create an appealing (not necessarily all positive) image of ageing that would make mainstreaming possible and put necessary resources into ageing and ageing research?

A number of research priorities were identified including the study of:

- Images of and attitudes to ageing. Factors influencing images and attitudes, especially those that could be used to create more positive views of older persons in society.
- Mechanisms whereby older people themselves can be agents of change.
- Factors that could convince key authorities in policy making to take into account a long-term view of ageing and accept a commitment to the consequences of demographic change, including positive contribution of older persons in social and economic terms.
- Existing and new models for engaging older people in the political process to promote mainstreaming of ageing. The effectiveness of these models in different countries and for different age groups.

3.2.2. To ensure full integration and participation of older persons in society (Commitment 2).

Research that could support the fulfilment of this commitment should strive to answer the following questions:

- What are the main social mechanisms that create or promote age discrimination?
- What are the technological barriers causing age discrimination and how can they be removed?
- What are the most effective ways to remove and prevent age discrimination?
- What are the «appropriate criteria» on which to make decisions concerning older persons, e.g., medical issues?

A number of research priorities were identified including the study of:

- Sex (gender) discrimination and age.
- Means to disabuse stereotypes of older people.
- Intergenerational programs - What is effective and why? Care giving - comparative research across Europe to reflect heterogeneity between and among older populations using methodologically consisting methods.
- Long-term care, including research on quality of life issues in nursing homes.
- Structural factors - those hinder or promote integration of older persons in Europe and comparative aspects of these phenomena between countries.
- Positive contributions of older persons.

3.2.3. To promote equitable and sustainable economic growth in response to population ageing (Commitment 3).

Research that could support the fulfilment of this commitment should strive to answer the following questions:

- How can economic growth be impacted by such factors as population dynamics; change in age and gender structure of labour force; level of labour force participation of older persons, and education attainment of older workers?
- What rates of economic growth are necessary to keep different social security arrangements sustainable and equitable across different regions?
- What are the potential mechanisms of wealth generation and its equitable distribution across the age range and throughout the regions, with particular emphasis on Eurasian countries in transition?
- What are the factors causing poverty and exclusion among the oldest old across Europe and what should be done to redress those factors?
- What structural reforms are necessary to narrow the gap in economic development between countries in transition and the remainder of Europe?

A number of research priorities were identified including the study of:

- Socio-economic scenarios of demographic changes across Europe focusing upon factors such as:
  - developmental opportunities of an ageing society
  - the interrelationship between economic growth and population dynamics, change in age and gender structure of

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1 Research priorities were not considered for this commitment which was essentially related to the overall implementation of the Strategy
labour force, level of labour force participation of older persons, and education attainment of older workers etc

- intergenerational transfer of assets: levels (family-community-society) and scope (economic versus social significance)
- economic security of «oldest old», and
- relationship of population ageing to development in Eurasian transitional economies.
- Dynamics of poverty in old age.
- Social security systems - alternatives and cross-national variations.

3.2.4. To adjust social protection systems in response to demographic changes and their social and economic consequences (Commitment 4).

Research that could support the fulfilment of this commitment should strive to answer the following questions:

- What is the meaning and consequences of «retirement» in different economic, social and cultural situations across Europe?
- What are the important substantive criteria for access (entitlement) to social protection systems to enable avoidance of simple age related criteria (including biomarker and social criteria) and the consequent negative outcomes such as ageism, stereotypes and decreasing self-sufficiency and esteem?
- How can the structure and funding of social protection systems, both formal and informal, be most effectively adapted in response to changes in needs and demands of older population?

A number of research priorities were identified including the study of:

- The effects of changes in family structure on social protection systems, both public and private.
- The effects of different incentive arrangements on retirement decisions.
- Conflicting interests between various stakeholders in social security protection systems and within different stakeholder groups.

3.2.5. To enable labour markets to respond to the economic and social consequences of population ageing (Commitment 5).

Research that could support the fulfilment of this commitment should strive to answer the following questions:

- What will be the meaning of retirement in the context of a more flexible life-course?
- Which incentives could improve opportunities for older people to be employed?
- What are the specific income-generating and employment needs of oldest old?
- What are the recruitment, training and retention approaches to meeting the labour requirements of health and social care sector? How these approaches are related to and influenced by the situation in the informal sector of care, where most of work is done by women?
- What are the relationships between individual health maintenance and labour market participation of older persons?

A number of research priorities were identified including the study of:

- Role of various factors, such as insurance schemes and the seniority principle in employment, in pushing older people out of employment. Mechanisms of withdrawal of older workers from labour market. Perverse and positive incentives for continuing employment in older age.
- Pace of societal change due to technological advancement, globalization etc., and its effect on older people in the labour force.
- Impact of migration policies on older age employment.
- The effects of re-training and re-skilling programmes for older workers on their working productivity and labour force participation.

3.2.6. To promote life-long learning and adapt the educational system in order to meet the changing economic, social and demographic conditions (Commitment 6).

Research that could support the fulfilment of this commitment should strive to answer the following questions:

- What are the ways and means to adapt the educational system to fulfil the needs and challenges of an ageing society?
- How are the ageing issues addressed in various existing educational curricula?
- What is the effect of lifelong learning on cognitive function and longevity?

A number of research priorities were identified including the study of:

- Evaluation, including from gender perspective, of existing training and re-training programmes with regard to their ability to support continuing and new employment of workers of different age.
- Evaluation of:
  a) strategies towards life long learning and their implementation, and
  b) existing programmes regarding impact on:
    - quality of life, including life long learning as a determinant of healthy mental ageing and prevention of mental deterioration
    - employability of older persons
    - physical, mental and social functioning, and
    - cohort effects evident in life long learning reflecting differing opportunities and attitudes over generations.
- The review of the presence/absence of life long learning perspective in the European educational system (EU and individual country levels).
- Provision and cost of life-long learning. Who will pay for life-long education?
3.2.7. To strive to ensure quality of life at all ages and maintain independent living including health and well-being (Commitment 7).

Research that could support the fulfilment of this commitment should strive to answer the following questions:

- What are the needs of older patients and care-givers with respect to early stages of Alzheimer’s disease and HIV/AIDS?
- What are the existing standards for training programmes for service providers and informal care-givers?
- What is the contribution of psychosocial interventions to enable older persons, including those suffering from mental diseases, to remain in the community of their choice?
- How can the effectiveness of interventions aimed at encouraging older people to make healthy choices, through e.g., health literacy, inter-sectoral approaches, etc. be improved?
- How could human rights of older persons be promoted through impartial corrective and complaint systems?
- What has been the impact of globalization on ageing, including through new technologies, different values, attitudes, etc.?
- What is the impact of loneliness on the quality of life?

A number of research priorities were identified including the study of:

- Accessibility of existing health and social services.
- The interrelationship, throughout the life course, between existing and new antecedents and determinants of quality of life and well-being.
- The contribution of psychosocial interventions to enable older persons, including those suffering from mental diseases, to remain in the community of their choice.
- Evaluation of existing standards and training programmes in palliative care including from a multicultural perspective.
- Quality of life and maintenance of independent living in community and institutional environment.
- Empirical definition of well-being and quality of life and harmonisation of methods of their monitoring and evaluation.
- Mechanisms for coping with disabilities in old age and ageing associated frailty and declines.
- Meta-analysis of quality of life studies.
- Construction and modelling of quality of life throughout life course.
- Different quality standards of health and social service.
- Research on effectiveness/lack of effectiveness of promoting healthy over unhealthy life styles including programmes of intervention for life extension (biotechnology and anti-ageing programmes).

3.2.8. To mainstream a gender approach in an ageing society (Commitment 8).

Research that could support the fulfilment of this commitment should strive to answer the following questions:

- What are the appropriate tools for gender research on ageing?
- How are older women discriminated against?

A research priority was identified as the study of:

- Gender inequality and gender differences in relation to legislation, social security systems, health and service accessibility; from within the family to the community to society at large.

3.2.9. To support families that provide care for older persons and promote intergenerational and intra-generational solidarity among their members (Commitment 9).

Research that could support the fulfilment of this commitment should strive to answer the following questions:

- What are the changing needs and roles of family members of different ages and family itself?
- How are changing structures, function, size and values of family affecting the traditional caring roles?
- What is the level and meaning of intergenerational solidarity in different European countries?
- What is the situation regarding family-related legislation and policy (e.g. inheritance, support to families caring for the elderly) across Europe?

A number of research priorities were identified including the study of:

- Family structures/forms and living arrangements in the face of demographic changes.
- Coping strategies within family and community for dealing with the social and economic consequences of demographic changes.
- Persons living outside family environment (new forms of family support, caring across distances, psycho-social dimensions).
- Migration and its impact on family and inter- and intra-generational solidarity.
- Grandparents’ role in the quality of life of children.

**TEN TOP PRIORITIES FOR RESEARCH ON AGEING IN EUROPE**

1. Images of and attitudes to ageing. Factors influencing images and attitudes, especially those that could be used to create more positive views of older persons in society.
2. Existing and new models for engaging older people in the political process to promote mainstreaming of ageing. The effectiveness of these models in different countries and for different age groups.
3. Dynamics and consequences of poverty in old age.
4. Social security systems - alternatives and cross national variations.
5. Role of various factors, such as insurance schemes and the seniority principle, in pushing older people out of employment. Mechanisms of withdrawal of older workers.
from labour market. Perverse and positive incentives for continuing employment in older age.

6. Evaluation, including from gender perspective, of existing training and re-training programmes with regard to their ability to support continuing and new employment of workers of different age.

7. Quality of life and maintenance of independent living in community and institutional environment.

8. Gender inequality and gender differences in relation to legislation, social security systems, health and service accessibility - from within the family to the community and to society at large.

9. Coping strategies for dealing with the social and economic consequences of demographic changes.

10. The effectiveness/lack of effectiveness of promoting healthy over unhealthy life styles, including programmes of intervention for life extension (biotechnology and anti-ageing programmes).

4. Methodological Challenges

The workshop identified a number of methodological challenges that needed to be addressed in developing and implementing the research agenda on ageing in the European context:

- Problems with translation and standardization of research protocols and methods.
- Need to standardize terminology and definitions, including age group definitions, in order to compare data across countries.
- Specific features of ageing in Eurasian countries in «transition» may need specific methodological approaches.
- Census activities could be modified to yield better data on aging e.g., in biological and psychosocial areas, and in more categories of age.

Research on ageing in Europe should include wherever appropriate the following methodological approaches:

- cross cultural, and cross European comparison,
- gender,
- life span,
- multi-, inter-disciplinary, and «a-disciplinary» (beyond disciplinary),
- qualitative and quantitative.

Methodological questions, including those related to both quantitative and qualitative studies, need to be explored. It is necessary to show clearly what the research need is, why it is important and what it will deliver. Holistic multidisciplinary studies, at both micro and macro levels, short term studies, and action oriented research should all be considered. Nonetheless theoretical research should be recognised as having brought essential benefits.

5. Implementation

The Valencia Forum adopted and subsequently the United Nations General Assembly welcomed the Research Agenda on Ageing for the 21st Century. The next task and challenge is to take the Research Agenda forward, including its promulgation and promotion at regional and national levels, as well as overcoming key methodological barriers to its achievement.

The Research Agenda on Ageing for Europe (RAA-E) should now be presented to the EU, other inter-governmental entities, such as CIS, European governments, universities and research authorities, foundations and institutes.

IAG should send RAA-E to national associations asking them to bring it to the attention of governments, research funding bodies, influential NGOs and others in their country. A summary version should be developed to facilitate distribution and promotion. National associations should report back to IAG on their progress, and their reports could be posted on IAG website to encourage further action.

The development of national agendas for research in ageing should be encouraged.

Linkages and transfers with and between developing parts of the region, including Eurasian countries with economies in transition, are important and should be facilitated by the UN, EU, other inter-governmental and non-governmental organizations, and research entities.

ANNEX 1. Participants, sponsors and logistics of the Barcelona Expert Workshop on Regional Research Priorities on Ageing for the European Region

Co-convened by Alexandre Sidorenko representing the UN programme on ageing and Gary Andrews, Immediate-Past President of IAG, on behalf of the IAG, the meeting brought together a group of 17 experts from the Region as well as participants from the IAG, WHO, UNFPA and other entities around the world. John Gray, Secretary-General/Vice President IAG served as rapporteur. The meeting was sponsored by IAG and Help the Aged (UK); James Goodwin represented the latter at the meeting.

Background papers were provided and presented to the meeting on key issues by Alexandre Sidorenko.

1 Participants noted that, for instance, The OASIS project uses same terminology in 6 countries and may provide a good model for standardizing the definitions: http://oasis.haifa.ac.il.

2 “a-disciplinary” - the idea that research could be undertaken on human individual and population ageing outside of any traditional disciplinary constructs.

The workshop adopted, as a framework for the process of developing priorities in policy related research on ageing, the Regional Implementation Strategy for the Madrid International Plan of Action on Ageing, which was adopted by the United Nations Economic Commission for Europe (UNECE) Regional Ministerial Conference on Ageing (Berlin, September 2002).

Melinda Andrews, Centre for Ageing Studies, Adelaide Australia was responsible for the logistics and facilitation of the meeting.

**ANNEX 2. Research Agenda on Ageing for the 21st Century (RAA-21) — Project Background**

The idea of developing a global policy related research agenda on ageing was first proposed during the International Association of Gerontology (IAG) World Congress of Gerontology in Adelaide, Australia in 1997 in discussions between Dr. Alexandre Sidorenko Head of the UN program on ageing (UNPoA) and Professor Gary Andrews President of IAG.

The project was conceived as a collaborative effort of the UNPoA and the IAG, and convened jointly by Professor Andrews and Dr. Sidorenko.

A series of expert workshops sponsored by the Novartis Foundation for Gerontology and the German government was held, beginning in the International Year of Older Persons (1999) and culminating in a final meeting held in Salsomaggiore, Italy in December 2000, in which the Research Agenda on Ageing for the 21st Century was formulated. The Research Agenda was subsequently endorsed by the Valencia Forum (an extraordinary global meeting of researchers, educators and practitioners in the field on ageing), which took place under the auspices of IAG from 1 to 4 April 2002 in Valencia, Spain immediately prior to the Second World Assembly on Ageing. The following week the Research Agenda was tabled and presented to the Second World Assembly on Ageing in Madrid, Spain.

The Research Agenda on Ageing for the 21st Century (RAA-21) has now been published by the International Association of Gerontology and can be accessed on the World Wide Web through the UN and IAG or Valencia Forum web sites.

The UN General Assembly in its 2002 resolution «welcomed the adoption by the Valencia Forum of Research and Academic Professionals of the Research Agenda on Ageing for the Twenty-First Century, to support the implementation of the Madrid International Plan of Action on Ageing 2002» (A/RES/57/…).

RAA-21 has subsequently been referred to as a significant resource for pursuing research priorities in follow-up meetings that have been held. For example, specific reference to the Research Agenda was made check sentence… bringing it to the attention of governments as a guide to research action and priorities at the UN ESCAP Asia Pacific Follow-up to the Second World Assembly on Ageing held in Shanghai, China 23-26 September 2002.

The next phase of the development of RAA-21 focused, through a series of expert workshops, on the formulation of regional research priorities. This formulation was undertaken in relation to the elaboration and adoption of regional strategies for the implementation of the Madrid Plan.
The first of these workshops was held in Cape Town, South Africa in association with the Africa regional conference GeriatrikaAfrica’03 in March 2003. Help the Aged (UK) provided support and funding for the workshop.

A second expert workshop was convened in Barcelona from 4 to 7 July 2003, immediately after the Vth European Congress of Gerontology and a third workshop was held on 1-3 September 2003 in association with the Latin American Regional International Association of Gerontology Conference (COMLAT IV Congress) held in Santiago, Chile. This workshop was co-sponsored by the UN Inter-agency Group on Aging with financial support from the UNFPA.

The fourth workshop was held prior to the Asia/Oceania Regional Congress of Gerontology in Tokyo, Japan on 21–24 November 2003. In this case the Asia Pacific Academy of Health Medicine and Ageing (APA/HMA) and the Centre for Ageing Studies, Adelaide, Australia provided support and funding.

The objectives for the workshops were:

- To review the issues, challenges and opportunities for ageing in the respective regions.
- To identify the most pressing policy related research priorities for the regions, as they relate to regional strategies for implementation of the Madrid International Plan of Action on Ageing 2002 in the regional follow-up to the Second World Assembly on Ageing.
- To present a report of the workshops outlining the outcomes of the exercise and dissemination of these to appropriate authorities, agencies and research centres throughout the regions.

The workshops were co-convened by Alexandre (Sasha) Sidorenko representing the UN program on ageing and Gary Andrews, Immediate-Past President of IAG on behalf of the IAG. The meeting brought together a group of 16 to 20 experts from regional countries and others drawn from the IAG, WHO, UNFPA and other agencies around the world.

Background papers were provided and presented to the meeting on key issues by several of the participants.

For the purposes of more in-depth deliberation the workshops met in plenary sessions and divided into groups to discuss a number of key arenas. The issues and research priorities identified in both plenary sessions and the small group discussions were then consolidated in final plenary sessions and presented in the form of:

- An overview of issues, challenges and opportunities relating to research on ageing in the Region.
- A set of priorities for policy related research on ageing in the Region.
- An action plan for promoting priority research on ageing within the Region.

This report on the European Regional Expert Meeting is now presented to all interested governments, international intergovernmental organizations, NGOs, research foundations, funding bodies and research institutes, in addition to individual researchers to consider when formulating research priorities and plans in the regional context.