

Annex A

Asking Canadian NGOs What Matters for Aging – Background Paper



CPRN RCRPP

Asking Canadian NGOs What Matters on Aging

Background Paper

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Contents

Foreword	iii
Introduction	1
Overarching Areas of Discussion	1
1. Two approaches to an aging society	1
2. Aging as a challenge to sectoral approaches to development	1
3. Diversity of seniors; sources of exclusion and disadvantage	2
4. Rural areas	3
5. Health and well-being	3
6. Living environment	4
7. Links between individual lifelong development, population aging and societal development	5
7.1 Senior participation, productive aging and social commitment	5
7.2 Work and retirement policies	6
8. Intergenerational relationships	6
8.1 Pensions and retirement income	8
9. Awareness and identification of research, knowledge and knowledge transfer gaps in gerontology	9
Conclusion	9
References	10
Appendix A: Demographic Background	1
Appendix B: Synopsis of Institutional Perspectives on Aging	2
1. International Positions	2
1.1 United Nations	2
1.2 Organisation for Economic Co-operation and Development	3
1.3 CSIS Commission on Global Aging	3
2. Canadian Positions	5
2.1 Report of the Secretary General, Canada's Comments	5
2.2 National Advisory Council on Aging	5
2.3 National Framework on Aging	5
2.4 Canadian Policy Research Networks	6
2.5 Report of the IYOP Canada Coordinating Committee	7
2.6 Seniors Independence Research Program	7
2.7 National Seniors Organizations Meeting	7

Foreword

In April 2002, the UN will host the Second World Assembly on Ageing in Madrid, during which the General Assembly will respond to and adopt a UN International Strategy for Action on Ageing 2002, now in draft form. The Strategy's goal is to ensure that people everywhere can age with security and dignity, continuing to participate in society as citizens with full rights. The Strategy calls for changes in attitudes, in national and international policies, and in community and corporate practices that support the aging population in reaching its full potential.

As a member of the General Assembly, Canada is preparing a response to the draft Strategy, with Health Canada assuming the lead responsibility in the background work. Part of this process involves seeking input from non-governmental organisations (NGOs) on how the Canadian government should continue to plan and ensure readiness for an aging society. This input, which focuses on 'healthy aging' and the range of factors affecting aging over the course of a lifetime, will be obtained through a series of public dialogue sessions are to be held with Canadian NGOs.

These public dialogue sessions were convened by CPRN and One World Inc., who were asked by Health Canada and Human Resources Canada in concert with a host of other federal departments to assist in getting a sense of what is important to Canadian NGOs on aging in Canada. This background paper was prepared in order to assist the initial process of selecting and framing of issues for use in the public dialogue sessions.

Introduction

As part of the project, 'Public Dialogue Toolkit and Moderator's Guide for Engagement of Canadian Civil Society: *Canada's Participation Strategy for the Second World Assembly on Ageing*'¹, CPRN was charged with providing a brief background paper for participants in the issues selection and issues framing processes. Accordingly, this paper aims to stimulate thinking and to ensure a good sense of the broader issue of aging² in the context of the UN initiative, as well as major Canadian stakeholders, including government, NGOs and popular opinion³.

Discussion is framed around comparisons, contrasts, and responses to the UN position. As an introduction to the issues, rather than a comprehensive guide to the policy debate on aging, particular attention is paid to statements of values, guiding principles, and relevant sectoral areas of concern as made explicit in the literature reviewed. This is assumed to be the best starting point for the process of selection and framing of issues to be presented in the Public Dialogues on Aging.

This paper follows the UN's position in addressing what the UN refers to as both the 'humanitarian' and 'developmental' aspects of the aging challenge. This means that issues for seniors themselves as well as the issues for society are discussed.

Overarching areas of discussion

1. Two approaches to an aging society

As suggested by The National Advisory Council on Aging (NACA), these approaches are 1) lower the age of the population through immigration; 2) help society adapt to aging⁴. NACA favours the second approach (while not debating the first), and the literature reviewed tends to focus on adaptation to aging. However, some institutions, such as the Center for Strategic and International Studies (CSIS) Commission on Global Aging, address measures to change the age distribution - for instance through immigration policy and parallel policies to ease multicultural integration within nations⁵.

2. Aging as a challenge to sectoral approaches to development

¹ Project title from Health Canada's Request for Proposal #: H1021-01-9038

² Note on spelling: the United Nations, and the OECD use "ageing", whereas the Government of Canada and most other institutions reviewed here use "aging". Throughout this paper, we will adopt the Government of Canada's usage unless referring to the UN, OECD or other institutions which use "ageing".

³ from 'Discussion on issue selection and framing processes, including reader's group for development of public dialogue toolkit', p3

⁴ NACA, 1999, p4

⁵ CSIS Commission on Global Aging, 2001, p6

There is general recognition of the need to actively engage the various sectors, within government and throughout society, in the challenge of aging. The United Nations notes that the imbalance between the sectoral approaches taken to national and international development is largely to blame for the challenges of an aging society; that equally efficient interventions in various sectoral areas are needed to ensure *'balanced growth and integrated development'*⁶; and that the integration of aging into governmental policies may therefore involve *'multisectoral policy adjustments'*⁷. Similarly, the OECD report *'Maintaining Prosperity in an Ageing Society'* states that:

*'the agenda for policy reform for maintaining prosperity in an ageing society requires a policy response cutting across traditional boundaries of economic, financial and social disciplines, and across traditional areas of responsibility of government administrations'*⁸.

Further, the OECD raises the important point that *'strategic frameworks'* to *'harmonise and sustain ageing reforms'* relate not just to the internal workings of government but also to building up essential public understanding and support⁹.

Closer to home, NACA has since 1991 advocated a *'national intersectoral aging policy'*, which is seen to be gaining momentum federally, provincially, and territorially with the National Framework on Aging¹⁰. Canadian seniors groups themselves have recognised the need for concerted action and common objectives vis a vis governments, and the importance of public involvement and partnership with government¹¹.

3. Diversity of seniors; sources of exclusion and disadvantage

All of the sources surveyed for this paper emphasise to some degree the diversity of seniors. The UN suggests that *'the situation of the elderly should not be considered separate from the overall socio-economic conditions prevailing in society'* and that the heterogeneity of the older population must be borne in mind¹². There is a general

⁶ UN, *'International Plan of Action on Ageing'*, Section III. Recommendations for Action, A. Goals and Policy Recommendations. <http://www.un.org/esa/socdev/ageing/ageipaa.htm>; A key example of this imbalance relevant to the issue of ageing is that the advances in the areas of medicine and public health have by far outpaced progress in other areas of social development.

⁷ UN, *International Year of Older Persons 1999, Conceptual Framework, Conceptual and Operational Framework Recommendations*. <http://www.un.org/esa/socdev/iyop/iyopcf0.htm>

⁸ OECD, 1998, p17

⁹ OECD, 1998, p9, p103

¹⁰ NACA, 1999, p7.

¹¹ Canadian Association on Gerontology, 2001. *'National seniors organisations come to a consensus on key issues'*, Newsletter, Vol. 27, No 1, March.

¹² UN, *'International Plan of Action on Ageing'*, General Policy Recommendations; UN, *The International Year of Older Persons 1999 Conceptual Framework, Situation of Older Persons*.

consensus that socio-economic disparities feed into disadvantage in old age¹³. The diversity created by such inequalities within the same generation is perceived by NACA as one of the major challenges of the next century¹⁴. Similarly, the NFA notes the importance of recognising the cumulative impacts on later life of various programs and policies targeted at earlier life stages¹⁵

‘Towards the Second Assembly on Ageing, Report of the Secretary General, Canada’s Comments’¹⁶ argues that the special sources of exclusion created by race/ethnicity, and gender are not adequately addressed by the UN¹⁷. In particular, attention is drawn to exclusion as it is experienced by Aboriginal peoples. Gender issues, ethnocultural groups and Aboriginal peoples are systematically addressed by NACA as specific aspects of senior diversity. The NFA’s general policy questions address respect in policies and programs for senior diversity based for instance on various socio-economic, cultural and geographic differences, and on gender¹⁸.

(Note: In terms of recognising diversity between nations, ‘Canada’s Comments’ points out the necessity of more explicit acknowledgement of the need for flexibility in adapting specific policy and strategy to different countries¹⁹.)

4. Rural areas

One particular aspect of heterogeneity pointed out by ‘Canada’s Comments’ is the diversity of rural areas. The UN focuses on rural development as key to the overall issue of aging in large parts of the world, and highlights the trend of rural-urban migration in both the developed and developing worlds. However, according to the Secretary General, the UN’s attention to rural areas should be broadened from agrarian economies to include primary industries such as fishing, forestry and mining²⁰. NACA draws attention to ‘seniors in urban, rural and remote communities’, and out-migration from rural and remote areas of younger people²¹.

¹³ See UN, NACA, NFA, ‘Canada’s Comments’ in response to the UN position; ‘Canada’s Statement on the Rights and Responsibilities of Older Persons’, p1; Report of the Canada Coordinating Committee to the FPT Ministers Responsible for Seniors, Sept 14, 1999

¹⁴ NACA, 1999, p3

¹⁵ National Framework on Aging, 1998, p10

¹⁶ referred to henceforth as ‘Canada’s Comments’

¹⁷ It is argued that the gender analysis and call for gender equality in the UN’s International Plan ‘should be made even stronger’, and that each of the three priority directions for policy action should incorporate a gender analysis. Further, issues of ethno-racial discrimination receive ‘virtually no attention’ in the UN Plan; in particular, Aboriginal populations face particular challenges in developed as well as developing countries. Report of the Secretary General, p2

¹⁸ National Framework on Aging, 1998, p10-11

¹⁹ ‘Canada’s Comments’, p2

²⁰ ‘Canada’s Comments’ p5

²¹ NACA, 1999, p17

5. Health and well-being, dependency and care vs. independence

The UN chose 'health and nutrition' as a sectoral area, and one of its key principles is 'care'. 'Canada's Comments' argues, however, that the UN should emphasise health promotion over healthcare. Similarly, NACA's issue area of 'Health and Well-being' goes beyond the issue of healthcare to encompass multifarious aspects of well-being, such as participation and social networks²². NACA's Report Card seeks to measure both 'How healthy are seniors?' and 'How is the health care system serving seniors?'

Another of NACA's issue areas, 'Maintaining Autonomy', and the UN and the NFA's principles of independence, can be considered key to health and to well-being in general; the issue of independence/dependence is bound up with all aspects of aging, but in particular the use of health care services²³. Further, according to Wigdor and Plouffe (1992), independence is stated by seniors themselves as their most important component of quality of life²⁴, and in numerous surveys and focus groups, seniors say they want more opportunities to remain independent, healthy, contributing members of society²⁵.

As regards specific areas of health and the status of older people, 'Canada's Comments' gives evidence to question the UN's assertion that mental health inevitably declines with advancing years and states that emotional disorders afflict only a minority²⁶. With regard to particular aspects of the healthcare system, the same report highlights the importance of abuse in institutions, and emphasises the need for analysis of types and perpetrators of abuse towards older people.

In the global picture, the sustainability of health care systems is one goal towards which the policy reforms recommended by the CSIS Commission are directed²⁷. Similarly, the OECD is particularly concerned with older people's healthcare from an efficiency perspective, and as a result recommends reform of the long-term care system and a better integration of health and long-term care²⁸. Other recommendations regarding health care are more equitable access to care, and improved protection against the financial risks associated with disability.

6. Living environment

'Living environment' is obviously of practical importance in ensuring and enhancing well-being for seniors. It can encompass such things as housing and transportation, which were both identified by a recent meeting of national seniors

²² NACA, 1999, p19-20.

²³ See the Seniors Independence Research Program (SIRP), for information see Neena Chappell, 2000, *Canadian Journal on Aging*; see also the issues raised by CPRN, Backgrounder, 2001.

²⁴ Wigdor and Plouffe, 1992, cited in Neena Chappell, 2000, *Canadian Journal on Aging*, i.

²⁵ IYOP Canada Coordinating Committee and NACA, 1999, p2

²⁶ 'Canada's Comments', p6

²⁷ CSIS Commission on Global Aging, 2001, p4

²⁸ OECD, 1998, p83

organisations as major issues to older people²⁹, and identified by the International Year of Older Persons Canada Co-ordinating Committee as sectoral areas key to the challenge of aging³⁰. The NFA's principle of security encompassed security of living environment and social networks as well as financial security; NACA's Report Card deals with the issues of housing and environment to answer the question of 'What are seniors' living conditions?'

7. Links between individual lifelong development, population aging and societal development

In its conceptual framework, the UN emphasises the theme of 'individual lifelong development' as it impacts on '*population maturity not only in terms of demography but also of intellect and emotion*'³¹. 'Canada's Comments' agrees with the key underlying vision of a world in which '*ageing is embraced as a potential for future development*'; the UN's '*holistic, life course approach that equitably addresses the needs of all age groups within society*'; and '*the challenge to the rigid division of life into education, work and retirement that dominates the developed world*'³². OECD suggests that '*the tripartite division of life*' is an important factor in the apparent increasing passivity in both the labour market and other domains of life as people grow older.

These links between individual and societal development are apparent in some key policy areas, for instance:

7.1 Senior participation, productive aging and maintaining 'social commitment'

The UN's theme of 'the situation of older people' embraces 'active ageing' as a key area for policy action, which is further embodied in its principles of 'participation' and 'self-fulfilment'. 'Canada's Comments' agrees with this prioritisation of the active participation of elderly, and the principle of senior participation is highlighted by NACA in '1999 and Beyond/ Challenges of an Aging Canadian Society' and is measured in its Report Card³³.

Participation is valued as an end in itself by seniors themselves; in numerous surveys and focus groups, they demand full partnership in efforts to develop policies and services that directly affect them³⁴. Participation of older people to ensure public involvement and investment in policy is also important to policymakers and NGOs³⁵. Moreover, particularly evident in the literature reviewed is the importance of participation to the link

²⁹ 'National seniors organisations come to a consensus on key issues', Canadian Association on Gerontology Newsletter, Vol. 27, No 1, March 2001

³⁰ Report of the Canada Coordinating Committee to the FPT Ministers Responsible for Seniors, Sept 14, 1999, p2

³¹ UN Conceptual Framework, Life Long Individual Development

³² Report of the Secretary General, p1

³³ NACA, 1999; 2001

³⁴ IYOP Canada Coordinating Committee and NACA, 1999, p2

³⁵ see Report of the Canada Coordinating Committee, Sept 14th, 1999; the CSIS Commission on Global Aging draws attention to the importance of civil society dialogue on aging and on perceptions of aging, p15

between individual and society development, and intergenerational relationships. Like the UN, NACA links the maintenance of ‘social commitment’, i.e. older persons’ participation, ‘*which challenges division between rigid life stages*’, to both individual well-being (‘dignity’) and societal prosperity³⁶. The responsibility for this social commitment is shared between society (which should offer opportunities for participation) and older adults (who should act on these opportunities). The question of participation of older persons therefore becomes key to the question of societal development.

The work of the NFA, however, might be used to highlight the diversity of seniors in response to this vision: the NFA asks whether policies/programs build on the capacity of seniors and adjust to different circumstances³⁷; a similar question could be asked of expectations of ‘social commitment’.

7.2 Work and retirement policies

Relating the vision of active aging to societal development, many institutions address the issue of adapting retirement policies to reflect the possibility of longer working lives. The UN suggests that “*the desire and capability of many older persons to continue working beyond retirement age is a reality*”.

In Canada, as elsewhere, the desirability of abolishing mandatory retirement is discussed, as well as more pro-active policies to raise the retirement age in line with increasing life expectations³⁸. At the same time, the movement of men out of the labour force at an earlier age is a phenomenon which is seen by some as the most important area for further study within aging³⁹. Reflecting this apparent tension, ‘Canada’s Comments’ points out that, in Canada, the possibility that people do not necessarily want to work beyond retirement age must be appreciated. Policy attention must therefore be paid to issues of older worker retention not just labour market access.

Further, the OECD suggests that ‘*age itself may not be the fundamental barrier to employability*’⁴⁰; the barrier is instead education levels among older workers. Consequently human resource development for the whole population and in particular lifelong learning is a necessity⁴¹, and work policies must work in conjunction with education policies to break down the tripartite division of life.

³⁶ *‘the need to maintain an adequate, well-trained, motivated and productive labour force may finally lead to concerted societal efforts to break down the rigid distinctions among the time for learning, for care, for work and for retirement’*, NACA, 1999, p7

³⁷ National Framework on Aging, 1998, p11

³⁸ For instance see the National Advisory Council on Aging, 1999

³⁹ Denton and Spencer, 2000, Canadian Journal on Aging, p24

⁴⁰ The OECD notes that there is no biological reason for terminating work in people’s 60s; people now have the capacity to be active beyond the age of 70, and serious incapacities are concentrated in the last two - four years of life, OECD, 1998, p83

⁴¹ OECD, 1998, p83

Broader issues of income support/social security systems are also addressed by various institutions, as well as issues of women's working lives and family policy⁴².

8. Intergenerational relationships – private and public. Is intergenerational equity an 'image' or 'distribution' problem?

Intergenerational relationships and more specifically intergenerational equity are a key concern as the proportion of older people in society increases.

The UN's theme of 'Relationship between generations' draws attention to the context of changing family and societal population structures, affecting the interplay between 'self-preserving and society preserving impulses'⁴³. This theme can also be related to the UN's key principle of 'fairness'. There are three levels of intergenerational exchange according to the UN:

- 1) Family
- 2) Community
- 3) Nation

According to 'Canada's Comments', the UN suggests a link between personal choices that involve delay of immediate gratification (e.g. personal retirement savings, healthy lifestyles) and perceptions of older adults in terms of living 'respectful and productive lives'. To the UN, then, at least according to 'Canada's Comments', the issue is about perceived equity between generations where images of aging play a role to the viability of social contracts involving age transfers.

NACA adopts a comparable position to the UN in suggesting that image, and therefore public opinion, is integral to the framing of 'Intergenerational Issues'. The 'deserving' image of seniors which led to the establishment of age-based state provision is according to NACA being replaced, to an extent, by a depiction of seniors as wealthy, capable and less deserving of support. This is due to the vitality and prosperity of a growing number of seniors, and a difficult social and economic climate. While the more traditional images may be pushed onto the older senior years rather than eliminated, the newer images may lead us to lose sight of the needs of vulnerable seniors and those who are living in poverty⁴⁴.

In the light of accusations that seniors are taking more than their fair share, and questions about whether policies of intergenerational cohesion will be sustainable given the growing imbalance between 'payers' and 'payees', NACA suggests reflection on the following points:

⁴² CPRN for instance highlights that pensions should be addressed within the wider issue of income security, including for example policy instruments in tax and housing policy, CPRN Backgrounder, April 2000

⁴³ UN, Conceptual Framework, Multigenerational Relationships

⁴⁴ The National Advisory Council on Aging, 1999, p3. The Council notes that the proportion of seniors who are living in poverty is similar to the proportion of children who are poor.

- public support strengthens private support (this is reflected in the recommendation of ‘Canada’s Comments’ that government policy should enhance intergenerational social exchange)
- increased public spending will not be catastrophic
- the potential of the oldest members of society is not fully used
- seniors contribute to the funding of public spending

In contrast, ‘Canada’s Comments’ claims that the intergenerational equity “problem” is due more to the distribution of resources and benefits throughout society than to the image of older persons⁴⁵. Similarly, the OECD⁴⁶ suggests that it is the simple fact of fewer workers to support more retirees which raises issues of intergenerational fairness in addition to fiscal issues. As a result the OECD devotes much attention to decreasing the burden on government and the taxpayer of transfers resulting from an aging society.

The CSIS Commission on Global Aging covers ‘Family Policy’ as one of its key policy areas, within which intergenerational equity in terms of burdens and benefits is addressed⁴⁷, while The National Framework on Aging includes the principle of fairness⁴⁸.

8.1 Pensions and retirement income

Various institutions favour pensions as a foremost policy concern⁴⁹, and pension reform was one of the major issues identified by a recent National Seniors Organizations Meeting⁵⁰. Further, ‘intergenerational equity’ is a theme recurrent in discussion of pensions in the context of limiting public spending. International concern surrounds the increasing proportion of populations eligible for public pensions and the corresponding decrease in contributors. For the UN, demographic aging in developed countries means adjusting macro-level policies for income security in old age⁵¹, and suggests that ensuring the means of livelihood and income security has become the key sectoral issue for all countries⁵².

The OECD and the CSIS Commission on Global Aging devote considerable discussion to ensuring sustainable old age pension and health care systems, in the context of fiscal and economic challenges to national and global stability and growth. According to the OECD, maintaining public pension systems probably requires a reduction in their generosity, in addition to balancing them with other forms of retirement income, both

⁴⁵ Report of the Secretary General, p3-4

⁴⁶ OECD, 1998

⁴⁷ CSIS Commission on Global Aging, 2001, p14.

⁴⁸ NFA, 1998

⁴⁹ for instance, see NACA, 1999; International Year of Older Persons Canada Coordinating Committee Report, Sept 14th, 1999

⁵⁰ Thirteen participating organisations reached consensus on the major issues facing Canadians in September 2000. See Canadian Association on Gerontology, 2001. ‘National seniors organisations come to a consensus on key issues’, Newsletter, Vol. 27, No 1, March.

⁵¹ UN, Conceptual Framework, Development and Ageing of Populations

⁵² UN, Conceptual Framework, Situation of Older Persons

pension and non-pension⁵³. The OECD also suggests that earnings will become a greater source of income for older people, especially if retirement becomes more gradual. The growth in importance of private pension schemes requires examination of issues of regulation, and may or may not benefit from the investors' diversification of portfolios to include non-OECD countries⁵⁴. The CSIS Commission draws attention to the *'institutional rigidities of public and private pension schemes'*⁵⁵.

The OECD plays down the consequences of decreases in public pension provision to the overall income of retirees in general, using international evidence to claim that *'the living standards of older people do not depend directly on the generosity of public pension levels, as people make other arrangements to support themselves in retirement when public pensions are low'*. The organisation does note, however, that lowering public pension levels may have to be accompanied with increased targeting to ensure that those who do depend on public pensions are not adversely affected⁵⁶.

The interaction between pensions and various social transfer systems to produce incentives to retire at a younger age and disincentives to work until an older age are a concern for OECD⁵⁷, among others.

9. Awareness and identification of research, knowledge and knowledge transfer gaps in gerontology

There is widespread recognition that any approach to the issues of an aging society must be grounded in research findings about the status of older people and the 'reality' of aging, and that more work needs to be done in building a knowledge base⁵⁸.

Conclusion

This background paper is intended to provide an introduction to the issues relating to an aging society, rather than an exhaustive survey of the literature. Furthermore, it is expected to stimulate thinking on the broader issue of aging through its discussion of those values, principles and sectoral areas which stood out in reviewing of some of the key documents on aging in Canada and internationally. In this way, it will contribute to the issues selection and framing process in advance of the public dialogues with Canadian NGOs.

⁵³ OECD, 1998, p51

⁵⁴ OECD, 1998, p27

⁵⁵ Denton and Spencer, 2000, *Canadian Journal on Aging*, p24

⁵⁶ OECD, 1998, p51

⁵⁷ OECD, 1998, p19-20

⁵⁸ For instance see UN, International Plan of Action on Aging; NACA, 1999; Shapiro and Havens, 2000, and Denton and Spencer, 2000, in *Canadian Journal on Aging*; OECD, 1998.

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United Nations

The International Plan of Action on Ageing,

<http://www.un.org/esa/socdev/ageing/ageipaa.htm>

NOTE: Since this background paper was prepared, the UN has released the revised plan, which can be found at

<http://www.un.org/esa/socdev/ageing/waa/ISAA1E.htm>.

International Year of Older Persons 1999, Conceptual Framework,

<http://www.un.org/esa/socdev/iyop/iyopcf0.htm>

Report of the Secretary General, *Canada's Comments: Towards the Second World Assembly on Ageing*

Appendix A: Demographic Background

The world⁵⁹

- 1) **Why more older people?** The UN writes that ‘The twentieth century has witnessed in many regions of the world the control of perinatal and infant mortality, a decline in birth rates, improvements in nutrition, basic health care and the control of many infectious diseases. This combination of factors has led to an increasing number of proportion of persons surviving into the advanced stages of life’
- 2) **Increase in the population over the age of 60 years**, particularly in the segment of those aged 80 years and over.
- 3) In many countries, **the increase in the proportion of the over-60 population is expected to become apparent over the next few decades**, and especially during the first quarter of the twenty-first century
- 4) **Increasingly women will constitute the majority of these elderly populations**

Canada⁶⁰

- 1) In Canada, also, **the dramatic growth in the number and proportion of seniors lies just ahead** – in the first four decades beyond 1999. By 2020 there will be as many seniors in the population as children (19%). By 2041, they will comprise 22.6% of Canada’s population.
- 2) The CSIS Commission on Global Aging suggests that **developed countries might be underestimating upward trends in longevity**, assuming they will moderate⁶¹. However, as noted by NACA, the aging of the population is not a transient ‘baby boom’ phenomenon, the persistently low fertility rate will maintain a high ratio between the number of seniors and the rest of the population for the foreseeable future.
- 3) **‘Unprecedented nature of the current aging process’** - baby boom seniors expected to be in better physical and mental condition, with improved economic situation.
- 4) Seniors expected to be more ‘integrated’ into society in future for various reasons (eg education level, skills, participation rates etc)
- 5) **Demographic aging is not necessarily the most important factor in determining future public sector costs and revenues**. NACA notes that the main problem is how to make budgets reflect rising demands in some areas (e.g. health care, social security) coupled with falling demands in others (e.g. education)
- 6) **Factors such as immigration and mortality can have only minor effects on age distribution** in the longer run; even much higher fertility rates would still leave a higher markedly higher proportion of older people than today.⁶²

⁵⁹ UN International Plan

⁶⁰ NACA ‘ 1999 and Beyond/ Challenges of an Aging Canadian Society’

⁶¹ CSIS Commission on Global Aging

⁶² see Denton and Spencer, Canadian Journal on Aging, Summer 2000, p3

Appendix B: Synopsis of Institutional Perspectives on Aging

1. International Positions

1.1 The United Nations

International Plan of Action on Ageing was endorsed by the United Nations General Assembly in 1982, and is the first international instrument on ageing. The Plan aimed to *‘strengthen the capacities of Governments and civil society to deal effectively with the ageing of populations and to address the developmental potential and dependency needs of older persons. It promotes regional and international cooperation’*⁶³.

The developments in the UN’s position since the International Plan form the current international framework of standards and strategies, including:

- The United Nations Principles for Older Persons, adopted by the United Nations General Assembly in 1991.
- The Conceptual Framework for the International Year of Older Persons, 1999, which is based on the Plan and Principles.

Sectoral areas

The International Plan was based around the following sectoral areas, with policy and strategy recommendations grouped accordingly⁶⁴:

- health and nutrition
- protection of elderly consumers
- housing and environment
- family
- social welfare
- income security and employment
- education

Principles

The UN’s Principles for Older Persons are grouped into five clusters relating to the status of older persons as follows:

- independence
- participation
- care
- self-fulfilment
- dignity

⁶³ International Plan of Action on Ageing, Foreword, <http://www.un.org/esa/socdev/ageing/ageipaa.htm>

⁶⁴ in addition to its attention to action on the frontiers of research, data collection and analysis, training and education, *ibid.*

Note: Canada's Statement on the Rights and Responsibilities of Older Persons⁶⁵ responds directly to this by outlining briefly the Canadian situation on each of these principles.

Conceptual Framework

The UN's Conceptual Framework for 1999 organised the UN's thinking to date into four themes or facets, which '*underscore the "lifelong" and "society-wide" dimensions of ageing*':

- situation of older people
- individual lifelong development
- relationship between the generations
- interrelationship of population ageing and development

Priority Directions

1. development for an ageing world
2. advancing health and well-being into old age
3. ensuring enabling and supportive environments

1.2 Organisation for Economic Co-operation and Development (OECD)

OECD Ministers at their meeting in 1996 requested the Organisation to further its analysis of the challenges in key policy areas in relation to population ageing, and to report back in 1998. This was reinforced by the request of leaders at the G7 summit meetings in 1997 for the OECD to undertake further specific work in the area of ageing populations. Following the release of the report, 'Maintaining Prosperity in an Ageing Society', OECD Ministers at their meeting in 1998 agreed to take into account the report's principles for interrelated policy reforms in developing national strategies, and to monitor progress through the OECD.

Principles

The central objective of reforms according to the OECD is to ensure that the way societies transfer resources to a rapidly growing number of retired people creates neither major economic nor social strains. Seven principles were identified to guide these reforms, regarding:

1. Reform of public pension systems, taxation systems and social transfer systems.
2. Reforms to ensure job opportunities and relevant skills for older people.
3. Fiscal consolidation and public debt reduction, including public pension benefit reductions and contribution rate hikes
4. A greater focus on cost-effectiveness in health and long-term care
5. Development of advance-funded pension schemes should be accompanied by strengthening and regulating of the financial market infrastructure
6. Strategic frameworks at the national level to harmonise ageing reforms, and to ensure adequate attention to implementation and to the build-up of public understanding and support.

⁶⁵ IYOP Canada Coordinating Committee and the National Advisory Council on Aging, 1999.

1.3 The Center for Strategic and International Studies Commission on Global Aging

The Center for Strategic and International Studies (CSIS) in 1999 launched a two-year Global Aging Initiative and convened a Commission on Global Aging. The Commission is an 86-person panel including representation from politics, government, business, academia, and the non-governmental sector from three continents⁶⁶. The areas covered by Policy Recommendations were as follows⁶⁷:

- Public pension, retirement, and health policies
- Economic restructuring and labour policy
- Immigration policy
- Family policy (including intergenerational equity in terms of burden and benefit)
- Employer labour practices
- Civil society initiatives (including dialogue on aging and perceptions of aging, older person's participation in voluntary activities, cross-sectoral initiatives towards lifelong learning and health promotion, etc.)
- Diplomatic consultations
- Managing global shocks

⁶⁶ under the leadership of former Japanese Prime Minister Ryutaro Hashimoto, United States Vice President Walter Mondale, and former Deutsche Bundesbank President Karl Otto Pohl. Following a year of research and discussion, Commission members were surveyed in spring 2001 to determine their views on the fiscal, economic, financial and international political challenges presented by global aging, CSIS Commission on Global Aging 2001, p3.

⁶⁷ CSIS Commission on Global Aging 2001, p11-16

2. Canadian Positions

1.1 *Towards the Second World Assembly on Ageing. Report of the Secretary General. Canada's Comments*

The general position taken by Canada with respect to the UN's current position, as expressed in the International Plan of Action on Ageing, is agreement on: conceptual framework; priority directions for policy action; and the general domestic and international process for achieving the Plan. Many of the changes to the Plan suggested in Canada's Comments relate to emphasis, tone or wording. However, perhaps of greater importance are Canada's general areas of concern for Canada, in particular that a stronger emphasis is needed in certain areas of aging, and that stronger regard should be given to diversity between nations.

1.2 *National Advisory Council on Aging*

In '1999 and Beyond/ Challenges of an Aging Canadian Society', the National Advisory Council on Aging (NACA)⁶⁸, presents the issues and challenges of aging, with emphasis on delineating the responsibilities for action of the individuals, the family, the community and the State, and on intersectoral action. It presents a series of indicators that will make it possible to measure the development of Canadian society with respect to the senior population. The following key issues/themes emerge:

- Diversity of Seniors
- Health and Well-being
- Maintaining Autonomy
- Financial Security
- Work and Transition to Retirement
- Intergenerational Issues

'Seniors in Canada: A Report Card by the National Advisory Council Aging', 2001 is the follow up to '1999 and Beyond/ Challenges of an Aging Canadian Society'; the series of questions asked in the Report Card are seen to capture 'key aspects of senior's health and well-being'⁶⁹, and fall under the following key issues:

- Health (How Healthy are Seniors? How is the Health Care System Serving Seniors?)
- Economic Conditions (How Well are Seniors Faring Economically?)
- Housing and Environment (What are Seniors Living Conditions?)
- Participation (How are Seniors Participating in Society?)

1.3 *The National Framework on Aging (NFA)*

The National Framework on Aging was established by FTP Ministers Responsible for Seniors to 'ensure a common approach for monitoring and reviewing changes to seniors programs and services across jurisdictions, and assist in examining the cumulative effects of policy changes on Canadian seniors.'⁷⁰

⁶⁸ NACA, 1999

⁶⁹ NACA, 2001

⁷⁰ 'Why an NFA?' <http://www.hc-sc.gc.ca/seniors-aines/nfa-cnv/en/b2e.htm>

The NFA includes a vision statement and set of five principles.

Vision: "Canada, a society for all ages, promotes the well-being and contributions of older people in all aspects of life".

Principles which guide actions by which the vision can be achieved:

- Dignity
- Independence
- Participation
- Fairness
- Security (financial, living environment, social networks).

The general policy questions developed by the NFA to assist policymakers in the application of the principles indicate some guiding concerns, for evaluation of policies/programs, which can be summarised as follows:

1. Respect for senior diversity
2. Recognition of cumulative impacts throughout life cycle
3. Inclusivity vs. isolation of seniors
4. Cost/benefit analysis of supporting society's aspirations
5. Building on seniors' capacity and flexibility
6. Active commitment of various sectors throughout sectors (intersectoral?)
7. Individual versus collective needs

IMPORTANT: The opinion of seniors on what constitutes the issues of aging can be somewhat discerned from the Principles and policy questions of the National Framework on Aging. The Principles arose from shared values expressed in consultations with seniors, while the policy questions which form the Policy Guide represent a synthesis of suggestions from 150 seniors, policy analysts and other experts who took part in a series of consultative "policy circles" held across Canada⁷¹.

1.4 CPRN Backgrounder: The Best Policy Mix for Canada's Ageing Society

CPRN suggests that policy challenges for aging exist in the areas of

- Health
- Labour market
- Fiscal areas
- Intergenerational equity
- Gender equity
- Public and private responsibilities
- Distributional matters

CPRN identified research streams for 'the best policy mix' as follows:

- Rethinking Ageing
- Income Security

⁷¹ National Framework for Aging, 1998, p6, p8

- A Values Dialogue
- Ethics and Ageing Society
- Ageing and Dependency
- The Politics of an Ageing Society (i.e. ‘adequate representation of *all* in an ageing society’)

1.5 Report of the International Year of Older Persons Canada Coordinating Committee to the FPT Ministers Responsible for Seniors, September 14th 1999

The Canada Coordinating Committee (CCC) identified the following sectoral areas as key to the challenge of aging.

- Pensions
- Housing
- Transportation
- Health
- Employment

1.6 Seniors Independence Research Program (SIRP) of the federal government⁷²

Fourteen programs of applied research on health, social and economic issues related to seniors’ independence were funded in four theme areas:

- Financial income and fiscal issues
- Evaluation and comparison of programs, systems, models of care and activities designed to support independence of seniors
- Medication use in the seniors population
- Mutual aid/self-help, self-care

1.7 National Seniors Organisations Meeting, September 2000⁷³

The thirteen participating organisations reached consensus on major issues facing older Canadians, namely:

- Medicare
- Pension reform
- Ageism
- Housing
- Transportation
- Funding of seniors groups

⁷² see Neena Chappell, 2000, Canadian Journal on Aging, p. ii

⁷³ Canadian Association of Gerontology, 2001. National seniors organisations come to a consensus on key issues’, Newsletter, Vol. 27, No. 1, March.