Towards an EU Age Equality Strategy: Delivering equal rights at all ages
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Our Proposal for a concrete follow-up
to the EU Green Paper on Ageing
Introduction

AGE welcomes the focus of the European Commission on demographic change and the publication of this Green Paper on Ageing, which initiates a broad policy debate on ageing across the European Union. We also welcome the opportunity to participate in the consultation to identify opportunities for policy action in the areas covered by the Green Paper. **In line with the EU’s objective to build a ‘Union of Equality’, we call on the Commission to ensure that any follow-up action on ageing is based on equality and human rights and uses all the available EU policy instruments and processes to mainstream ageing and advance equality and human rights at all ages.**

To achieve this, **we suggest that the European Commission elaborates an ‘Age Equality Strategy’** which will provide both the necessary conceptual framework to mainstream ageing in all EU action and also include targeted policy options for the way forward. In this document, we outline key elements of such proposed ‘Age Equality Strategy’, which includes proposals of actions to challenge age discrimination and age stereotypes, achieve equal participation in society, improve equal access to employment, enforce the right to adequate income, foster access to health and long-term care, improve the mainstreaming of ageing across EU policies and initiatives, and equally promote human rights for all ages at international level.

This is our proposal for a concrete follow up to the Green Paper on Ageing.

**Disclaimer:** in this proposal, we do not address the whole age spectrum since we focus on those issues that we have identified as important from the experience of old age. But in the long run, we would recommend the European Commission to consult with other age groups and representative organisations too (like the European Youth Forum) and equality networks in order to adequately address life transitions and inequalities across the lifecourse.
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Building the case of an EU age equality strategy: why do we need such a strategy?

To change the narrative around ageing based on equality and human rights

While the Green Paper covers a wide range of key issues for older persons, the analysis it offers is primarily based on ageing as a challenge for European economies and for future generations. Despite also pointing to ageing as an opportunity, the overall narrative that the Green Paper adopts is one of ageing as inherently linked with decline, passivity, and vulnerability. It is now well established that ageing is a lifelong process, which involves both gains and losses due to the combination of biological, psychological, and social mechanisms. The narrative underpinning the Green Paper, which portrays ageing as a process of irreversible and inevitable loss of functional capacity is in stark contrast with EU’s objective to promote active and healthy ageing and intergenerational solidarity and does not reflect the multiple factors, which affect lived experiences of ageing and are more often than not socially constructed.

Policy responses, which focus on the loss of physical and mental capabilities of people as they age and on meeting ‘vulnerabilities’ and ‘needs’ contribute to a negative narrative of ageing, which neglects older people’s experience, their potential, and their contribution to society. As explained by the EU Fundamental Rights Agency in their 2018 report ‘Shifting perceptions: Towards a Rights-Based Approach to Ageing’:

‘Ageist and deficit-based approaches and perceptions also affect how older people are treated as a social group. Stereotypes of ageing and old age lead to ageist rhetoric. This portrays older people as a ‘silver tsunami’ curtailing economic growth and being a ‘burden’ to society. Older people are characterised as unproductive, frail and incapable, especially in the context of an ageing society facing challenges regarding its demographic future and the sustainability of its pensions and social protection systems. At a societal level, such ageist perceptions can reinforce exclusion, discrimination and marginalisation and affect intergenerational solidarity by pitting younger people against older people. Such one-sided views fail to recognise the valuable contributions older people make to their families, communities and wider society in many ways. Many older people are unpaid, informal carers of grandchildren and family members, participate in volunteer activities in their communities and act as mentors’.

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1 For an overview of literature, see - among others - Duane Alwin:

To change this negative construction of ageing, the Fundamental Rights Agency suggests that policy reforms must move away from needs-based approaches aimed at responding to ageing ‘problems’, towards shifting the focus to the individual, a human being with fundamental rights and inherent human dignity. According to Article 1 of the EU Charter of Fundamental Rights, human dignity is inviolable and must be protected and respected, regardless of age.

If the EU is serious about creating a ‘Union of Equality’ it must address ageing as an equality issue, aiming to uphold human rights equally at all ages and to address all those barriers that keep us from living fairly and freely as equals when we are older.

In addition, this strategy would include measures that are necessary to fight ageism and age discrimination to promote positive narratives and policy approaches to ageing, an aspect which is not adequately addressed in the Green Paper. An Age Equality strategy would complement the existing EU acquis, which already includes strategies on gender, disability, children, LGBTI+, Roma in line with EU’s priority to build a Union of Equality. It would also allow the EU to better address inequalities across the life course and to combat intersectional forms of discrimination.

An essential component of this strategy would be to push for the adoption of new anti-discrimination legislation covering among other grounds also discrimination on the basis of age.

To ensure consistency with EU and Member States’ commitments

During the last 12 months, we have seen a high number of statements made by the EU and its Member States including commitments to ensure the equal protection of our human rights in older age. This strategy would be the opportunity to follow up on these commitments and to ensure consistency.

Here are the most important documents officially adopted and which shall constitute the basis of future action at EU and Member States level:

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3 Ibid, page 23
• 146 Member States committed to the policy framework presented by the Secretary-General of the United Nations in his brief on the Impact of COVID19 on Older Persons\(^6\), among them all the EU Member States and the EU itself (May 2020).

• Council Conclusions adopted by all EU Member States on:
  - The rights, participation, and well-being of older people in the digital era (October 2020)\(^7\)
  - The Mainstreaming of Ageing in Public Policies (March 2021)\(^8\)
  - Human Rights-based Recovery (February 2021)\(^9\)

• The EU Action Plan on Human Rights and Democracy 2020-2024 adopted by the EU Council (November 2020)\(^10\).

• Adoption by the General Assembly of the United Nations of the resolution on Decade of Healthy Ageing (2021-2030)\(^11\).

All these developments demonstrate that promoting and protecting the human rights of older persons in EU’s internal and external action is an urgent and critical priority for the EU, its member states and citizens. This now needs to be translated from words into concrete action.

**To ensure coherence in the way ageing is addressed across EU policies (mainstreaming) and apply a rights-based approach into practice**

An Age Equality Strategy would frame all the different issues included in the Green Paper, such as lifelong education and learning, access to health and care services, social protection and work and access to the labour market as rights that must be guaranteed equally at all ages. It will constitute a comprehensive policy framework identifying a series of policy options and instruments that the European Commission and Member States can take in the thematic areas covered by the Green Paper.

Indeed, today we lack systematic mainstreaming and coordination among different European Commission services on ageing. While the European Commission Task Force on Equality should ensure the mainstreaming of age

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equality throughout the different policy areas, it works mainly as an internal body. A clear focal point for civil society organisations working on ageing issues would be needed to ensure a strong ongoing dialogue.

This would also be critical to ensure a more consistent approach in key concepts, approaches and terminology used in different policies and initiatives related to ageing. To give an example, we consider that a lifecourse approach is critical: unlike the lifecycle approach, which is overly focused on biological underpinnings of life stages\(^\text{12}\), the lifecourse approach pays due attention to the social context, roles, and individual trajectories. A lifecourse approach reflects better the idea of non-linear and more flexible life stages put forward in the Green Paper\(^\text{13}\). It also shows the importance of combating socio-economic inequalities and lifetime discrimination experienced by people of all ages, including ageism, and is the best way to ensure equality in older age. Similarly, an Age Equality Strategy would provide much needed guidance of how to apply a rights-based approach to ageing in practice\(^\text{14}\).

\(^{12}\) [https://link.springer.com/referenceworkentry/10.1007%2F978-1-4020-8265-8_201175]

\(^{13}\) See p.3 ‘takes into account the fact that the traditional stages of education and training, work and retirement are becoming less rigidly defined and more flexible.’

1. Equality and non-discrimination

Equality and non-discrimination are core values and fundamental rights in the EU, enshrined in its Treaties and in the Charter of Fundamental Rights. The European Commission, the Parliament, and the Council, together with Member States, all share a responsibility to protect fundamental rights and ensure equality for all. The EU and its Member States have been pioneers in recognizing the rights of older persons and outlawing age discrimination.

- Article 25 of the EU Charter of Fundamental Rights is strategically placed under the Chapter on Equality, recognizing that protecting older people’s right to live in dignity and independence and to participate in society is a matter of equality.
- Under the Treaty on the Functioning of the European Union (Art. 10 and 19), the EU shall aim to combat discrimination, including based on age, when defining and implementing its policies and activities and has powers to take positive action in this respect.
- Age equality is considered a general principle of EU law.
- The EU Employment Directive advanced protection from age discrimination in the field of employment

In addition, EU member states are also parties to several instruments by the wider Council of Europe (47 states) that promote age equality and aim to guarantee the human rights of older persons:

- Article 23 of the Revised European Social Charter was the first ever provision worldwide enshrining ‘the human rights of the elderly to social protection’.
- In 2014 the Committee of Ministers of the Council of Europe adopted a Recommendation on the promotion of the human rights of older persons.

Despite these achievements, persistent ageism is hampering EU efforts to ensure the full participation of older persons in society.

Based on the 2019 Eurobarometer Report on Discrimination in the EU\textsuperscript{15}, age discrimination - alongside gender discrimination - is the most frequently experienced form of discrimination in the EU. Over 40% of individuals believe that age discrimination is widespread in their country. The first UN Global

\textsuperscript{15} https://data.europa.eu/euodp/en/data/dataset/S2251_91_4_493_ENG
Report on ageism\textsuperscript{16} shows that in Europe, more than one in three people over 65 reported having been a target of ageism (p.34). Ageism and age discrimination have serious consequences both for older people and society at large. COVID-19 exposed in sharp\textsuperscript{17} ways how ageism can lead to stigma, segregation, neglect, abuse, isolation and even death.

The following actions should be the basis of this Strategy:

- Promote public awareness around equality and non-discrimination in older age and the rights and capacities of older persons; promote a positive image of ageing and eliminate any ageist institutional, systemic, or structural practices which affect the human dignity of older persons.

- Undertake or promote research on ageing and on issues particularly affecting people in older age, and provide accessible, appropriate

\textsuperscript{16} Published in March 2021 - https://www.who.int/teams/social-determinants-of-health/demographic-change-and-healthy-ageing/combatting-ageism/global-report-on-ageism

\textsuperscript{17} https://www.age-platform.eu/policy-work/news/covid-19-older-persons%e2%80%99-rights-must-be-equally-protected-during-pandemic
information to older persons on their rights and entitlement to benefits and resources.

- Guarantee the rigorous and unbiased implementation of the Employment Equality Directive by Member States and national and European courts.
- Extend EU legal protection against discrimination on the basis of, among other grounds, age beyond the area of employment and vocational training in order to close the gaps in EU law\(^\text{18}\).
- Make sure that all EU initiatives on equality and their implementation adequately address multiple and intersectional forms of discrimination in old age, including - among others, issues faced by older women, older people with disabilities, older LGBTI+ people, older Roma people, etc.
- Ensure that all Member States designate an equality body to address age discrimination.
- Extend the list of EU crimes to cover hate speech and hate crime and cover, among other grounds, hate speech and hate crime based on age.
- Ensure that all EU legislations and initiatives, including the 2012 EU Directive on Victims’ Rights and the EU Victims’ Rights Strategy 2020-2025, take into account the specific issues faced by older people and persons with disabilities who are at a higher risk of becoming victims of crime including in cross border settings.
- Rectify the current invisibility of older people in data and statistics\(^\text{19}\) by addressing age limitations in surveys, the lack of information about older people living in institutions, ensuring that data is collected, disaggregated, analysed, utilised, and disseminated by all ages and other characteristics and that Member States collect adequate comparable and reliable data.
- Ensure that the Fundamental Rights Agency (FRA) better integrates aspects of age discrimination and the human rights of older people in their ongoing work and dedicates a specific project to explore more in-depth issues affecting the equal enjoyment of human rights in older age.

\(^{19}\) [https://undocs.org/A/HRC/45/14](https://undocs.org/A/HRC/45/14)
2. Participation

Full and effective participation and inclusion in society is a right for everyone regardless of age. This area is wide and covers diverse issues such as involvement in decision-making, life-long learning, access to culture, political participation, access to justice. It requires us to pay attention to prerequisites like accessibility and environments, which play an important role since they hold incredible potential for enabling or constraining the possibilities and capacities we have to be included in our societies. The COVID-19 crisis shed lights on how much digitalisation can help in a pandemic context but also reinforce barriers, notably for those already excluded and/or isolated.

The following actions should be the basis of this Strategy:

- Ensure the active participation of older persons as equal partners in shaping, implementing, and monitoring policies, laws and public programmes which relate to their rights and interests.
- Foster accessibility by:
  - ensuring a proper implementation and monitoring of legal instruments like the European Accessibility Act, the Web-accessibility Directive, as well as transport accessibility legislation;
  - continuing to expand the legal tools and relevant EU standards to support accessibility in compliance with the UN Convention on the Rights of Persons with Disabilities (UNCRPD);
- Help member states accelerate efforts to develop systems that are compliant with the UNCRPD, including for instance through supported decision-making mechanisms.
- Support initiatives and policies which are compliant with the art. 19 of the UNCRPD, i.e., ensuring independent living and inclusion in the community at all ages. All older people should have the choice to decide where and with whom to live, enabling them to remain independent in the community they feel most comfortable in.
- Engage older people in EU political processes and consultations, like the European Parliament’s elections, the Conference on the future of Europe. Likewise support the participation of older people in EU funding programmes and projects.
• Education, lifelong learning and vocational training, notably digital education action plan to focus on all stages in life, instead of being linked only to labour market participation\textsuperscript{20}.

• Tackle the digital divide and digital poverty, which increase the risk of social exclusion and create further inequalities. This should encompass funding support and initiatives to improve infrastructure (access to electricity and broadband coverage), to support equipment (PCs, tablets, smartphones) and digital literacy.

• Ensure full and equal access to mainstream services, so that face-to-face options remain available whenever services are digitalised (e.g., public administration, transport, bank).

• Prioritise accessible and affordable public transport (vehicles, infrastructure, built and outdoor environments) in its funding programmes to ensure door-to-door mobility between and within EU countries, therefore enabling participation and social inclusion and tackling geographical divide, notably for people living in remote and/or segregated community/area.

• Support a lifecourse approach for housing policy and initiatives, and support initiatives that adapt to the changing needs of its inhabitants. And enhance a comprehensive approach of EU policies and initiatives related to housing such as Renovation Wave for Europe, Green Deal, EU Cohesion Policy Fund, European Pillar of Social Rights, EU4Health, considering the interlinks between housing, health, environmental issues, energy poverty, long-term care, accessibility, poverty and social inclusion, etc.

3. Employment and skills

The EU is currently trying, with limited success, to encourage longer working lives, mainly focusing on pension legislation to encourage older workers to work for longer. It fails to address the older unemployed, who are the least likely to find a new job and most at risk of long-term unemployment. The fact that gender gaps are highest in the years before retirement - the gender poverty gap, gender pay gap, gender employment gap both in terms of employment rates and hours worked - is not visible nor addressed in the EU’s employment strategy nor the Gender Equality Strategy. Currently, only one in two women aged 55-64 is in employment, and only three in five persons overall in this age group.

In contrast to a ‘lifecycle’ model where an employee gets initial education, works, and retires, the EU should move towards a more flexible model where periods of transition between learning, working, family care, inactivity/retirement take place multiple times and at different ages of an individual’s life, including after statutory retirement age²¹.

The following actions should be the basis of this Strategy:

- Employment directive: reassess the exemptions made on the ground of age, which effectively limit equal participation in the labour market and the possibility for longer working lives.

- Promote the value of age-diverse workforces and recruitment among employers, policymakers, and judges22.

- Move away from managing unemployment to managing careers by:
  - introducing a framework for individual learning accounts for employees, giving rise to learning opportunities but also to paid educational leave;
  - encouraging the development of mid-career reviews of challenges, barriers, skills, aspirations of employees;
  - scrutinising the implementation of the Council Recommendation on Long-Term Unemployment23 and the Council Recommendation on Upskilling Pathways24;
  - supporting the European Network of Public Employment Services to help older jobseekers, including older female workers;
  - establishing a reflection on individual assessments of a workers’ aspirations, plans, skill needs before reaching retirement age.

- Improve the ability to reconcile work and private life across the lifespan. A Council recommendation on social protection for and services to informal carers should strengthen informal carers’ income security, access to health services including mental health support, training, and peer exchange. A future review of the Work-Life Balance Directive should propose increasing the number of days allowed to take carers’ leave and set minimum standards for their remuneration and continued employment-related rights.

- Fight and prevent physical and psycho-social risks such as stress and burnout in the next EU Occupational Safety and Health Framework. Improving mental health at work should be a priority.

- Fund research on sustainable workplaces and durable employability based on up-skilling and life-long learning, work-life balance policies, health prevention and promotion in the workplace, improving mental health at work and promote results across the EU action and initiatives.

Support senior entrepreneurship by assessing existing barriers, such as the loss of pension entitlements during entrepreneurship while drawing a pension, fund and promote such as incubators for intergenerational co-entrepreneurship.
4. Adequate income

Despite Principle 15 of the European Pillar of Social Rights on old-age income, the Action Plan published in March 2021 does not include sizable action on realising the right to an adequate income. Poverty and social exclusion rates of people over 65 are rising, and the rates for persons just before pension age (55-64) as well as for women over 75 are higher than the EU average. Old-age poverty takes extreme dimensions in several EU member States; therefore action is urgent to ensure adequate old-age income. Beyond protecting from poverty and social exclusion, adequate income in old age is a precondition for realising the rights for social inclusion and participation in society. Old-age income should reflect efforts and contributions made throughout the careers, including in the form of unpaid care. The gender pension gap of 30% shows that this is not currently the case.
The following actions should be the basis of this Strategy:

- Create a European framework for minimum pensions when updating the EU framework on minimum income, setting a methodology taking into account the costs to maintain an adequate standard of living.
- Strengthen action on pension adequacy as part of the EU Semester.
- Maintain solidarity mechanisms in statutory pension systems to compensate for disability, sickness, or unemployment during working lives, regardless of the mix of pension pillars, including by adopting an initiative on pension credits for care;
- Ensure adequacy of pensions over time by guaranteeing pension indexation at least in line with inflation but taking into account the specific expenses of older people (like health, long-term care).
- Promote the introduction of care credits in all member states’ pension systems as a measure to reduce the gender pension gap and further explore the reality, causes and measures to close the gender pension gap.
- Create a framework for universal access to the accrual of pension rights, including for men and women, self-employed, and persons in new forms of employment, persons with disabilities and persons excluded from the labour market.
- Rather than focusing on statutory retirement age, move towards empowering older workers to stay in the labour market; remove barriers such as mandatory retirement or the inability to combine work and pensions.
- Adopt an initiative for the social protection of and services for informal carers.
- Consider innovative solutions to ensure fairness (e.g., tax income from profits, financial transactions or pollution to fund social protection) and adopt a life-course perspective approach, notably to better measure the impact of social investment.
- Regularly assess the coverage of the total workforce by occupational pensions, as well as eventual gaps in coverage linked to gender, branch, employment contract etc. in EIOPA’s consumer trends report.
- Lead a reflection on how occupational pension coverage can be expanded especially to groups who have no access to such pensions and the impact of occupational pensions on the gender pension gap.
- Follow-up on the recommendations of the high-level group on supplementary pensions whose final report\(^\text{25}\) was released in Dec. 2019.

5. Health and long-term care

Autonomy and independence must be the principles guiding action in health and long-term care in line with art 25 of the EU Charter of Fundamental Rights and the UN Convention on the Rights of Persons with Disabilities. Addressing challenges in care should be part of a comprehensive, long-term strategy combining investments and prevention, especially now in the pandemic recovery and crisis preparedness period. In long-term care and support for older people, lack of access, unaffordability and low quality are issues consistently reported. Given those challenges, increasing their levels of public spending on long-term care is a necessary policy for EU Member States, not only to compensate for increasing demand but also to enforce a true right to quality long-term care as prescribed by the European Pillar of Social Rights. If put at the heart of a lifecourse perspective, health promotion and disease prevention can be a powerful tool to combine improved access, greater levels of quality and sustainability of public budgets.

The following actions should be the basis of this Strategy:

- Mainstream the impact of EU policies on people’s health, following the health-in-all policies approach (Council Conclusions, February 2019).
- Prioritise public health in all relevant EU funding instruments: the EU budget offers multiple opportunities to help build a healthy Europe, and to combine that objective with other important goals including fighting the climate and environmental crisis, tackling psycho socio-economic and regional inequalities, improving healthcare systems, ensuring a fair, open, and secure digital environment.
- Develop a European Mental Health Strategy to foster the right to mental health and to access health services and social support, including non-drug-based support regardless of age.
- Introduce EU-wide quality and access indicators for long-term care and support, and to allow for benchmarking by building on existing reporting systems.
- Set compulsory access targets, similarly to the Barcelona targets\(^\text{26}\) for childcare, to measure progress in access to long-term care and support. Particular ambition should be given to the development of access to community and home-based services, in line with the UN Convention on the Rights of Persons with Disabilities and principle 18 of the European Pillar of Social Rights.

• Improve working conditions in the care sector, via a dedicated EU Sectoral Social Dialogue for social services to raise qualification and training requirements, wages and health and safety at work.

• Enforce regulations in the running of private for-profit care services, including assessing the possibilities for action at EU level to address the lack of quality and insufficient enforcement of regulations.

• Fund and upscale innovative practices on access to care in rural and low-density areas to enable older people remaining at home and in their communities.
6. International EU agenda

The EU Action Plan on Human Rights and Democracy 2020-2024\(^{27}\) (November 2020), called on the EU to ‘advocate for the enjoyment of all human rights by older persons at all times, as well as for ensuring adequate and sustainable solutions for their needs’. But progress is in practice slow, limited, and inconsistent. Despite the scale and severity of the violations of older people’s human rights during the COVID-19 pandemic, the European Commission, and the European External Action Service (EEAS) have not shown the same level of involvement as previous years in the 11\(^{th}\) Session of the UN Open-Ended Working Group on Ageing (OEWG)\(^{28}\).


\(^{28}\) The OEWG is the only global forum that brings together states, civil society, national human rights institutions, UN agencies and experts to focus specifically on strengthening the protection of the human rights of older persons, including the possibility of a new UN convention. As the OEWG meets only once a year, and the 11th Session had to be postponed due to the pandemic, it was especially important for Member States to attend and demonstrate that they take the protection of the rights of older people seriously.
In the future, EU’s external action must live up to the commitments of the EU Action Plan on Human Rights and Democracy and to mirror the encouraging signs of greater political support from Member States for the EU to take a more proactive stance on the need for new approaches, as presented in the EU Council conclusions by the German and Portuguese Presidencies.

To date no international human rights treaty has been adopted without the support of European states. The EU and its member states paved the way in outlawing age discrimination and protecting the rights of older people in national and regional instruments. As shown in a recent UN study\(^{29}\), both in the EU and in other parts of the world older people cannot always rely on regional or national systems to protect their rights. We need an international instrument so that all of us - no matter where we live - are entitled to the same rights when we are older. Now is the time for the EU to lead again by supporting a new UN convention for the equal protection of human rights in old age\(^{30}\).

The following actions should be the basis of this Strategy:

- Involve representative organisations of older persons in the design, development, implementation, monitoring and evaluation of initiatives related to combatting age discrimination and promoting the human rights of older persons in the frame of EU’s external action, including EU’s position at the UN Open-Ended Working Group on Ageing.

- Actively participate in the next session of the UN Open-Ended Working Group on Ageing and support the establishment of a sub-group of the Working Group that would include experts from Member States, Civil Society Organisations and National Human Rights Institutes, and the Independent Expert to assist the Working Group in this task during the intersessional period.

- Actively promote the human rights of older persons and address the intersection of ageism with other grounds of discrimination across all EU external action.

- Promote the fight against age discrimination in the EU enlargement and international development programme, including by supporting Civil Society Organisations.

- Develop a strong cooperation with the United Nations around the UN Decade of Healthy Ageing (2021-2030).


• Take into account Older People in the implementation of Sustainable Development Goals.

• Promote and raise visibility of programmes of humanitarian assistance or development cooperation benefitting older persons.