

### Global AgeWatch Index: measuring wellbeing of older people across the world: promoting paradigms of active and healthy ageing

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# Global AgeWatch Index: Measuring wellbeing of older people across the World

## Promoting paradigms of active and healthy ageing

*We live in a society that will be unrecognisable to visitors travelling in time from the early 20th century. While noticing the many technological wonders of this age, they would also notice something a lot simpler, something which we today take for granted: increasing numbers of us are living considerably longer!*

- On average, in most countries around the world life expectancy at birth is now around 70, which has more than doubled since the start of the 20th century.
- One-third of babies born today can expect to live 100 years, whereas such an expectation of longevity was unimaginable during the early 20th century.
- Not only that but we also are healthier in old age and can now look positively to the prospect of an active and engaged life during old age.

Many factors in tandem account for this extraordinary development: advances in technology, medicine and public hygiene, but just as important are the adjustments to our own personal lifestyles, such as healthy diets and regular exercise throughout the course of our lives.

These are indeed societal achievements to celebrate, although equally there are challenges to longer living, and we have been slower in acknowledging and responding to these challenges of being older in this new era. Older people remain vulnerable in many ways as in previous generations, and the longer life also brings the risk of breeding a wider range of vulnerabilities (for a discussion, see Zaidi 2014). Such vulnerabilities of old age will become even more dominating if our understanding of the needs and potentials of older people remain tied to primitive, antiquated paradigms of ageing and old age.

The paradigm of the elderly person as a dependent on family and state must now be seen as outmoded and instead be replaced by paradigms of active and healthy ageing. Increasingly, older people have the potential to be active and productive, provided they are supported by age-friendly social and physical environments. The most important aspects of the new paradigms of ageing are to ensure the provision of decent levels of pension income, access to health and social care and opportunities to remain independent, active and engaged.

### Strengths of the Global AgeWatch Index

The availability and analysis of data on old age is increasing our understanding of the lives of older people. A good example of such analytical work is the Global AgeWatch Index, which the author developed in a close collaboration with HelpAge International in London.

The Global AgeWatch Index (referred to as “the Index” hereafter) is the first analytical framework that uses the latest comparative and quantitative data available internationally to measure and monitor key aspects of the economic and social wellbeing of older people globally. It is inspired by the examples of UNDP’s Human Development Index (see e. g. Human Development Report (HDR) 2013) as well as the 2012 Active Ageing Index of the European Commission and the United Nations Economic Commission for Europe (for more details, see Zaidi et al. 2013) in its selection, development and use of multi-perspective quantitative indicators. Underpinning the Global AgeWatch Index are three key objectives: the need to highlight the importance of comparative data on ageing, the need to present this data in a way that will engage national and international policy-makers, and the need to help point to areas for future policy actions in different contexts across the World.

The conceptual grounds of the Index are based on our review of literature on the measures of wellbeing of older people, particularly those arising from the seminal work of Amartya Sen on the concept of capabilities (see, for instance, Sen 1999). It is believed that real progress towards promoting the quality of life and wellbeing of older people can only be made by looking at the multiple dimensions of income security and health status, the opportunities for work and education, and by generating an enabling environment for older people providing social support, personal freedom, physical safety and access to basic public services such as transport.

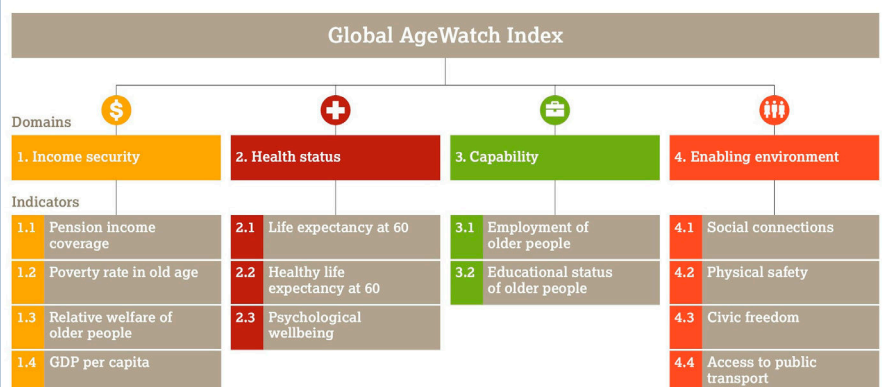
Therefore, the Index includes information in four domains to give a fuller picture of wellbeing of older people.

- It takes into account income security by looking at whether pension incomes are adequate and cover enough people.
- It measures health status by looking at life expectancy at age 60 and the psychological wellbeing of older people.
- The enabling attributes of older people are captured by investigating education and the extent to which older people have access to employment.
- And it considers how far countries offer enabling, age-friendly environments. For example, can older people feel safe in their neighbourhood? Do they have access to crucial public services?

Figure 1 displays the four domains and 13 indicators used in the Global AgeWatch Index. All of these are important considerations that make for a better life in old age.

Since its inaugural launch in October 2013 (HelpAge International 2013a, 2013b), the Index has provided credible comparative information on the wellbeing of older people across the globe. Most critically, the evidence generated has helped us identify the specific economic, health, and environment contexts in which older people fare better. It has also helped identify policy interventions that are effective in reducing their vulnerabilities.

Figure 1: Global AgeWatch Index Domains and Indicators



**Table 1: Ranking and index score of the Global AgeWatch Index in 96 countries around the world**

	Overall rank and value		Income security		Health status		Capability		Enabling environment	
	Rank	Value	Rank	Value	Rank	Value	Rank	Value	Rank	Value
Norway	1	93.4	1	89.1	16	73.5	1	76.2	4	80.1
Sweden	2	88.3	9	82.8	12	75.2	3	65.7	6	79.4
Switzerland	3	87.9	29	76.0	2	81.3	10	58.0	1	83.7
Canada	4	87.5	7	83.2	4	80.3	8	59.7	9	78.9
Germany	5	86.3	15	80.5	11	75.6	5	62.8	11	78.6
Netherlands	6	86.0	5	85.6	13	74.8	11	57.4	5	79.6
Iceland	7	85.3	3	87.5	8	79.2	16	52.8	10	78.8
United States	8	83.5	22	78.7	25	70.1	4	65.0	17	76.8
Japan	9	82.6	31	75.4	1	83.9	12	56.8	21	75.0
New Zealand	10	80.7	27	77.1	9	77.8	6	61.8	30	71.5
United Kingdom	11	80.1	11	82.7	27	69.3	23	46.1	3	81.8
Denmark	12	77.6	18	79.8	33	68.1	20	48.3	14	77.7
Australia	13	76.1	61	52.2	5	79.8	2	70.2	26	72.5
Austria	14	76.0	6	84.6	19	72.7	43	34.1	2	82.7
Finland	15	75.8	16	80.4	21	70.8	30	43.9	18	76.1
France	16	74.8	2	88.0	7	78.3	37	36.3	23	74.2
Ireland	17	74.2	20	79.1	17	73.1	34	38.7	16	77.0
Israel	18	72.2	45	68.1	26	69.8	13	55.3	35	69.6
Luxembourg	19	71.3	4	87.0	10	76.6	54	29.4	19	76.1
Estonia	20	67.7	38	72.4	55	50.0	7	61.8	39	68.1
Spain	21	67.6	41	71.3	3	80.5	56	29.2	22	74.7
Chile	22	67.5	42	70.5	14	74.4	27	44.7	49	66.0
Uruguay	23	65.3	10	82.8	37	63.3	29	44.5	57	63.5
Panama	24	65.0	39	72.3	31	68.7	33	40.2	48	66.4
Czech Republic	25	64.8	13	82.0	47	56.1	28	44.5	50	65.8
Costa Rica	26	64.0	51	64.6	15	73.8	49	32.0	29	71.6
Belgium	27	63.9	40	71.8	30	68.7	58	28.9	24	73.4
Georgia	28	61.3	48	65.9	60	46.2	15	53.2	45	67.1
Slovenia	29	60.1	23	78.6	38	63.2	81	19.2	7	79.2
Mexico	30	59.5	34	73.3	35	64.5	52	29.9	46	66.7
Argentina	31	59.4	17	80.1	40	59.4	35	38.0	66	61.7
Poland	32	58.1	24	77.8	48	55.3	61	27.3	37	69.2
Ecuador	33	57.9	56	62.4	28	69.2	42	34.4	58	63.4
Cyprus	34	57.8	46	67.9	24	70.7	51	30.0	55	63.8
Latvia	35	57.0	32	74.2	66	44.1	14	54.0	68	60.1
Thailand	36	56.3	58	57.9	41	59.1	73	22.6	12	78.2
Portugal	37	55.3	12	82.1	23	70.7	79	19.4	51	65.4
Mauritius	38	54.2	8	82.8	63	45.0	70	24.6	38	69.2
Italy	39	53.9	25	77.5	6	78.7	69	24.6	74	58.5
Armenia	40	53.0	30	75.6	74	34.0	9	58.9	73	58.9
Romania	41	52.8	26	77.2	64	44.9	46	33.5	64	62.0
Peru	42	52.6	65	50.7	32	68.1	24	46.0	79	56.9
Sri Lanka	43	52.6	79	34.9	54	50.0	32	43.0	25	72.9
Philippines	44	52.3	73	41.9	76	31.9	18	50.2	15	77.3

in Sri Lanka is 52.6% of the best performing example country, giving it a shortfall of 47.4 percentage points below the best example country.

Many African nations are placed at the lower end of the spectrum, including Ghana, Uganda and Morocco. They have been particularly slower to improve pension provisions and employment opportunities for their older citizens. There are also fewer chances to access free healthcare and less community care and subsidised transport – these countries highlight the example where population ageing will become a serious economic and social issue unless concrete steps are taken in reaping benefit from the potential of older people.

Ukraine is one of those European countries that is ranked towards the bottom, having scored badly across three out of four domains – including in particular the health status of its older population. The older populations of the three lowest-ranked countries, the West Bank and Gaza, Mozambique and Afghanistan, account for less than five percent of the total population. This evidence points to issues in these countries that reduce people's chances to survive to old age.

Good practices are also identified on the basis of the results of the Index. For example, the top scoring Norway introduced its universal rights-based pension back in 1937, long before reaching anywhere close to its current high-income status. Sweden, which also rates high in the Index, celebrated 100 years of its universal pension system recently. The old-age pension programme of Germany, introduced in 1889, was one of the first ever pension annuity programmes introduced to ensure income security for the very old, above the age of 70. These systems were put in place at a time when these countries were at best what would in today's world be known as "the emerging economies".

Similarly, the best-performing African country, Mauritius, introduced a universal pension back in 1958. Most notable good performers are Latin American countries whose relatively high position in the Index can be attributed to the expansion of social pensions in the past decade. These kinds of pensions are said to be a game changer for older people, as they provide a basic regular income for some of the very poorest older people. In comparison, contributory pensions have not lived up to the expectation to support older people in low and middle-income countries. This is largely due to the fact that most people in these countries work in the informal sector and consequently do not qualify for formal pension schemes. Also, incomes are often too low to save for old age, which is why the usefulness of the social pensions has become apparent throughout the world.

### Key findings of the 2014 Global AgeWatch Index

On the basis of the latest Index results (HelpAge International 2014), launched on 1st October 2014, and by analysing national policies and strategies, it can be concluded that Norway is the best country in terms of older people's wellbeing, alongside Sweden, Switzerland and Canada. These countries are particularly good at offering top quality health and social care systems and provide better access to employment for their older citizens than other countries.

Germany is ranked 5th, although it is ranked 15th in the income security domain and 11th in the domain of the enabling age-friendly environment. Apart from Japan, the top ten countries are in Western Europe, North America and Australasia. Israel and Estonia join the top 20 this year.

The values of the Global AgeWatch Index provide a measure of potential that each country has in matching the best-performing example country in the sample. For example, Sri Lanka's overall Index value of 52.6 means that older people's well-being

Table 1: continued

Vietnam	45	52.2	70	46.8	36	63.9	71	24.4	31	71.3
Hungary	46	51.9	35	73.1	57	47.4	53	29.4	60	63.1
Slovakia	47	51.7	21	78.8	53	51.4	36	37.0	80	56.8
China	48	51.5	72	42.1	58	46.5	38	36.2	28	71.8
Kyrgyzstan	49	51.0	54	63.5	83	28.9	31	43.0	36	69.6
South Korea	50	50.4	80	32.5	42	58.2	19	48.6	54	64.1
Bolivia	51	50.3	55	62.6	59	46.4	22	46.6	78	57.1
Colombia	52	50.3	68	48.2	18	72.8	76	20.8	42	67.5
Albania	53	48.9	44	68.6	61	45.7	21	47.9	86	54.7
Nicaragua	54	48.9	77	38.0	45	57.0	59	27.7	33	70.6
Malta	55	48.4	52	64.1	20	72.1	87	14.3	47	66.4
Bulgaria	56	47.5	47	67.8	68	40.0	45	33.5	69	59.8
El Salvador	57	47.0	76	38.1	34	66.3	67	25.2	53	65.3
Brazil	58	46.3	14	80.8	43	57.4	66	25.6	87	54.6
Bangladesh	59	45.5	75	39.6	71	37.7	39	36.2	41	67.5
Lithuania	60	45.4	53	63.9	65	44.2	17	50.3	90	52.6
Tajikistan	61	45.0	57	59.0	80	31.1	40	35.0	61	63.1
Dominican Republic	62	44.4	81	29.9	39	61.0	62	26.8	43	67.3
Guatemala	63	44.3	74	41.3	44	57.0	84	17.7	34	70.2
Belarus	64	43.7	50	65.0	84	28.6	64	26.0	44	67.1
Russia	65	42.5	37	72.9	86	27.1	26	45.1	82	55.5
Paraguay	66	42.1	78	35.8	50	54.4	41	34.7	77	57.5
Croatia	67	41.7	66	50.6	49	55.3	77	20.5	72	58.9
Montenegro	68	40.9	60	56.0	56	49.1	78	19.5	70	58.9
India	69	39.0	71	44.6	87	27.0	55	29.3	52	65.3
Nepal	70	38.9	69	47.9	79	31.2	68	25.0	59	63.2
Indonesia	71	38.6	86	18.6	70	37.8	48	32.3	8	79.0
Mongolia	72	38.1	36	73.0	93	20.5	65	26.0	62	62.9
Greece	73	37.3	28	76.0	22	70.7	80	19.3	91	49.6
Moldova	74	36.2	63	51.6	90	25.8	50	31.6	76	57.7
Honduras	75	36.2	84	21.4	46	56.2	63	26.2	65	62.0
Venezuela	76	36.1	67	49.8	29	69.1	60	27.4	93	49.5
Turkey	77	36.1	33	73.3	52	52.5	93	6.0	40	67.6
Serbia	78	35.4	49	65.7	62	45.3	92	9.9	67	60.2
Cambodia	79	35.2	89	16.5	51	53.3	74	22.5	27	72.2
South Africa	80	35.2	19	79.6	89	25.9	75	22.3	83	55.0
Ghana	81	34.0	87	17.8	77	31.9	25	45.9	56	63.7
Ukraine	82	31.0	43	70.2	85	27.3	85	15.2	85	54.8
Morocco	83	30.3	64	51.1	72	37.5	88	14.2	89	53.9
Lao PDR	84	30.3	85	18.7	82	29.7	83	19.0	20	75.5
Nigeria	85	25.7	90	16.3	88	25.9	47	32.3	75	58.3
Rwanda	86	23.4	92	11.5	81	30.0	89	13.8	13	78.2
Iraq	87	23.1	62	52.2	75	32.8	91	11.2	92	49.6
Zambia	88	21.1	91	13.3	91	24.7	57	29.2	84	54.8
Uganda	89	19.5	93	11.3	82	22.1	72	23.9	70	58.9
Jordan	90	17.0	59	56.6	67	43.6	95	1.6	32	70.6
Pakistan	91	12.3	95	6.0	78	31.8	44	33.9	8	56.0
Tanzania	92	10.7	94	6.1	96	39.8	86	14.6	88	54.5
Malawi	93	6.4	96	6.0	95	18.8	82	19.0	94	48.4
West Bank & Gaza	94	4.5	82	23.0	73	36.6	96	1.3	63	62.3
Mozambique	95	4.1	88	17.3	94	18.9	94	4.2	96	45.1
Afghanistan	96	3.7	83	22.0	96	7.1	90	12.0	95	47.0

The latest 2014 Human Development Report (HDR 2014) provides strong links between the goals of human development and work underway for the Global AgeWatch Index. A critical consideration is that the persistence and impact of social and economic restrictions accumulate over a person's lifetime – on the basis of socio-economic class, religion, ethnicity, gender and age. Undercuts in economic opportunities and security accumulate into vulnerabilities in old age. Human development must be promoted across the life course; building resilience at all stages of life to enable people of all background and abilities to overcome challenges in old age.

A clear outcome of the Index findings – and our message to policymaking bodies – is the need for greater prioritisation of social protection and social services to improve older people's wellbeing. Such goals are to be pursued without losing sight of making public welfare systems sustainable in the long term.

#### Further research is required!

Further in-depth analysis is required and the UK's Economic and Social Research Council (ESRC) has recently awarded University of Southampton and HelpAge International a grant to do this in the four of the most populous countries: China, India, Pakistan and Bangladesh. The ESRC project has started in January 2015, and the evidence generated will feed into national and international debates about ageing and human development.

In-depth analysis of the data for these four countries will support future versions of the Global AgeWatch Index, strengthening its conceptual and empirical foundations. Also, the project will shed further light on differentials within these countries across subgroups of older people. This includes those between women and men, across different education and age groups, and across older people living in urban and rural areas.

Conclusions

Based on the past experience of similar indexes – such as the HDI of UNDP, and the GGI – one may expect that the Global AgeWatch Index will provide important support for advocacy with a wide range of stakeholders, especially in view of the rising importance of population ageing. The Index has started to serve as a benchmarking instrument, giving policy-makers an opportunity to identify areas of strength and weakness in comparison with the neighbouring or best performing countries worldwide.

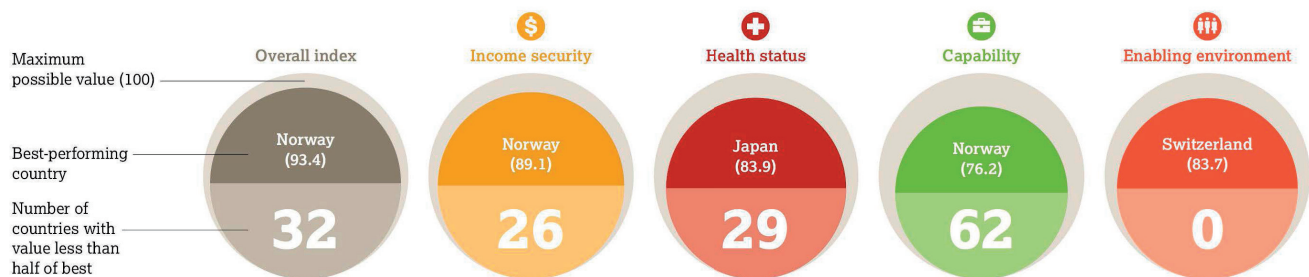
Over time, the Index will be developed further to capture additional perspectives of the quality of life and wellbeing of older people. Specifically, we seek to include a domain on the political and civil rights of older people, and to include separate results for men and women. Expanding country

#### Still, a lot needs to change!

The latest results released in the 2014 Insight Report point to clear evidence of mismatches between advances in longevity and the lag in the evolution of policies that empower older people. In particular, many of the sub-Saharan, Middle Eastern and Asian countries achieve less than one-third of the desirable

Index benchmark values (referred to as the best-performing example country) in terms of quality of life and wellbeing of older people. For example, as shown in Figure 2 below, on income security, 26 countries in the Index scored less than half the top values set by Norway and France (89.1 and 88.0 respectively).

Figure 2: Comparison with the best performing countries



coverage and inclusion of better data will also be a priority. Our hope is that the approach we have taken for the Index will help to ground global, regional and country debates on ageing and the wellbeing of older people with a shared and realistic understanding of these issues, and will lead to a better quality of life for older people everywhere.

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## Die Auswirkungen der Finanzkrise im Fokus der europäischen Sozialberichterstattung

In Ausgabe 52 des Informationsdienstes Soziale Indikatoren (ISI) wurde das neue Web-Portal „Social Monitoring and Reporting in Europe“ (<http://www.gesis.org/social-monitoring-reporting-europe/>) vorgestellt, das im Rahmen des EU FP7 Projektes e-Frame – European Framework for Measuring Progress entwickelt wurde. Das Web-Portal bietet auch Zugang zu einer Online-Datenbank, die kontinuierlich aktualisiert wird. Bei der Recherche mithilfe der Datenbank, die grundlegende Informationen zu gegenwärtigen Aktivitäten der Sozialberichterstattung und Dauerbeobachtung zur Verfügung stellt, gibt es die Möglichkeit zur Eingrenzung der Ergebnisse nach bestimmten Auswahlkriterien. Hier soll sie nun dazu genutzt werden, einen Überblick über die aktuellen Sozialberichte auf supranationaler Ebene zu gewinnen. „Supranational“ kann der Typ des verantwortlichen Akteurs („type of institution“) und/oder die räumliche Ebene („scope“) sein. Von primärem Interesse sind hier die Sozialberichte, die sich auf eine supranationale Ebene der Berichterstattung beziehen (v. a. auf die Ebene der Europäischen Union) oder alle bzw. eine Teilmenge der europäischen Länder vergleichend betrachten.

Bei der Durchsicht der aktuellen Ausgaben dieser Sozialberichte, zu denen die Datenbank via Weblinks verweist, zeigt sich, dass ein gemeinsamer thematischer Schwerpunkt auf der globalen Finanzkrise und deren Auswirkungen auf die Lebens- und Arbeitsbedingungen liegt. Meist bieten die in regelmäßigen Abständen veröffentlichten Berichte zunächst eine Zusammenstellung von Indikatoren zur Entwicklung der Lebensqualität in den Krisenjahren, unter-

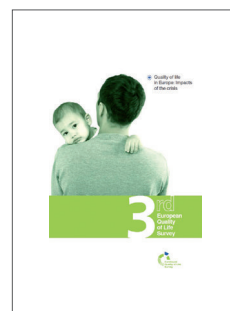
suchen daneben jedoch bestimmte Aspekte etwas detaillierter. Besonders deutlich wird diese thematische Konvergenz bei den Berichten, die von supranationalen und europäischen Organisationen veröffentlicht werden:

Alle vier bisher erschienenen Ausgaben des Sozialberichts *Employment and Social Developments in Europe* der Europäischen Kommission beinhalten Analysen zu den



Auswirkungen der Krise, wobei der jeweilige Schwerpunkt auf unterschiedlichen Teilbereichen liegt: 2011 ist das vor allem die Veränderung der Beschäftigungsstruktur, 2012 sind es Armut und soziale Exklusion sowie die

Rolle des Wohlfahrtsstaates, 2013 Arbeitsplatzbeschaffung und Gender-Aspekte. Die neueste Ausgabe von 2014 widmet sich der Frage, welche Länder der Europäischen Union die Krise besser überstanden haben als andere, und welche nationalen Bedingungen dazu beigetragen haben. Auf Basis dieser Beobachtungen werden allgemeine Vorschläge entwickelt, wie die Resilienz von Staaten gegenüber Finanz- und Wirtschaftskrisen erhöht werden kann.



Zwei aktuelle Ausgaben der Reihe *Quality of Life in Europe* der Europäischen Stiftung zur Verbesserung der Lebens- und Arbeitsbedingungen (Eurofound), einem EU-Gremium mit Sitz in Dublin, fokussieren