

Ageing and Development

News and analysis of issues affecting the lives of older people

Issue 15 October 2003



Alphonse Mwindo and his four grandchildren are starting to rebuild their lives in Goma.

Steps to recovery in Congo

A new power-sharing government was inaugurated in the Democratic Republic of the Congo in July 2003. It is supposed to bring an end to almost five years of war, in which human rights organisations estimate more than three million lives to have been lost.

However, the situation in the east and north remains dangerous and precarious.

Many people are struggling to survive after losing their homes in the conflict. The eastern province of North Kivu, which has Goma as its main city, has the highest number of displaced people, at more than 900,000.

Sofina Ndoule, 70, lives with her six grandchildren in a decrepit house in a town a few miles from Goma. The family spent nine years on the run, after fighting in their home area forced them to abandon their house, banana plantation, and livestock.

Like many older displaced people, Sofina Ndoule has no hope of returning home. 'Even if the area becomes secure, I am now too old and weak to work my land.' Her daughter lives nearby and helps provide for the children.

Goma is still recovering from another disaster – the vast lava flow from Mount Nyiragongo, which engulfed parts of the city in 2002, destroying the homes and livelihoods of some 60,000 people.

Older people who have little earning power are among those who have found it hardest to recover. Alphonse Mwindo, 70, lives with his four grandchildren in a house made of plastic sheeting. He used to be a school headmaster, but fled to Goma three years ago because of heavy militia fighting.

'Before, I was well off and respected. I had made allowance for my old age. Unfortunately,

because of the conflict, I was forced to come here with the grandchildren. Then the eruption burnt everything. I was forced into begging on the streets.'

He is among a number of older people who have received micro-credit from GEAD, a local NGO working with HelpAge International. With the money, he bought supplies of lamp oil, washing powder and cassava meal, which he now sells outside his house.

It is a long way from being a headmaster, but the first step to regaining his self-respect. 'This credit has given me a certain confidence for the days which I have left to me.'

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HelpAge International

Leading global action on ageing

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Antonio Cimosa/HelpAge International

A report on child poverty calls for the participation of the poor of all ages.

Poor progress on poverty

Three new reports show how achievement of the Millennium Development Goals requires social investment and the participation of the poor in decision-making – but only one of them calls for targeted, intergenerational approaches.

80 million lives, launched in September 2003 by the Grow Up Free from Poverty coalition of UK-based NGOs, reviews lack of progress towards the goal of halving child and maternal mortality by 2015. It calls for the participation of the poor of all ages, including older people, in the design, implementation and monitoring of programmes in core areas of health, nutrition and water supply.

Also in September, the World Bank published its 2004 World Development Report, *Making services work for poor people*. The report demonstrates that, while poor people should be at the centre of service provision, too often they are not able to access essential services. It recommends that the voice of the poor 'be amplified' in policy-making and that the poor 'monitor and discipline service providers.'

Launched in July, the 2003 UNDP Human Development Report, *Millennium Development Goals: a compact among nations to end human poverty* carries the stark message that, while the world might have the global know-how

to halve poverty by 2015, one-third of the global population still lacks the basics to survive.

The report calls for the commitment of all nations, rich and poor, to extend the 'wealth of possibilities in our globalised world' to all people. However, it does not examine specific issues relating to populations traditionally excluded from development, and prone to chronic poverty, such as older people.

80 million lives

www.savethechildren.org.uk

World Development Report

<http://econ.worldbank.org/wde/wdr2004>

Human Development Report

www.undp.org/hdr2003

Potential of pensioners' associations

The development of pensioners' associations and their potential to support poorer people are examined in a report from Ethiopia.

Ethiopia has about 60 registered pensioners' associations, ranging in size from about 40 members in regional towns to 30,000 in Addis Ababa. Many were formed after the fall of the military government

in 1992, to help members receive their pensions on time, and to lobby for improved pensions.

Many associations have continued to search for ways to improve their members' financial situation. Some have started income-generating activities or supported health and social activities such as clinics, day centres and libraries.

A few associations have developed a vision to support vulnerable older people, and have started including non-pensioners as members. However, many are at an early stage in this role, providing support to members only in emergencies.

The report concludes that, with assistance, pensioners' associations could be a powerful

force in advocacy and development in Ethiopia.

Reflection on partnership of pensioner associations in Ethiopia
Abebe Bekele, HelpAge International, March 2003

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Comment

Making the case for non-contributory pensions

International debate on development has been dominated by assumptions about what constitutes development, and who are the 'productive' populations as opposed to the 'dependent' or 'vulnerable'.

International benchmarks such as the Millennium Development Goals reflect these assumptions by

focusing on particular population groups and largely ignoring others. In international institutions where the views of development economists hold sway, pension and similar provisions for 'vulnerable' populations are consigned to the category of social welfare interventions – residual 'safety nets' for those outside the focus of development activity.

More recently these views have been challenged by the emergence of alternative arguments (see page 3). There is an increasing awareness that poverty reduction is not simply an outcome of

economic growth, but also of promoting equity, good governance, and the inclusion of the poor and marginalised in development processes.

These arguments recognise that vulnerability and marginalisation are socio-economic problems to be addressed by the development process, not the fault of individuals. Strategies need to reach the poorest for development objectives to be realised. Social protection, with cash transfers a primary element, has in this context begun to be seen as a legitimate development strategy.

Arguably there is both a moral and practical case for the provision of basic, non-contributory pensions to all older people in all developing countries; universal pensions are not only feasible but – with support from the international community – a viable option.

Basic pensions make a practical contribution to development, through providing social justice for older individuals, promoting equitable governance and stimulating economic growth.

Mark Gorman
Director of Policy Development, HelpAge International



Photo: Pann/HelpAge International

Many poor people are overlooked by policies aimed at reducing poverty.

Why do people stay poor?

The neglect of chronic poverty in development policy was recently challenged at an international conference that brought together more than 300 policy makers, researchers and NGOs.

Most policies designed to achieve global commitments to halve extreme poverty rely on poor people taking up the opportunities of a local and global market. But for many chronically poor people – including older people who are disabled, frail or deep in poverty – opportunity-based policies alone are not enough.

Staying Poor: Chronic Poverty and Development Policy was hosted by the Chronic Poverty Research Centre (CPRC), University of Manchester, in the UK in April 2003 to address these issues.

'Talking to the minister' – bringing research and evidence to the policy process – was a recurring theme of the conference. In a thoughtful presentation, Ugandan finance minister Gerald Ssendaula argued that governments must give priority to improving the conditions of chronically poor people through effective social safety nets, free education and pro-poor growth.

The conference challenged conventional views of income transfers to the poor, in the form of pensions or other benefits, as, at best, a short-term palliative. Speakers argued that pensions and welfare grants of various kinds

can not only reduce poverty, but can also be a productive investment for the economy as a whole.

Mark Gorman, director of policy development for HelpAge International, highlighted the emerging, although limited, evidence of the capacity of non-contributory pensions to reduce old-age poverty.

Older people themselves placed a high value on pensions, and confidence in affordability and implementation methods was increasing, he said.

As Martin Ravallion, senior advisor to the World Bank's Development Research Group, concluded: 'There is no obvious alternative to targeted transfers, barring unacceptable neglect.'

More information:

Many of the conference papers are available from the CRCP website at: www.chronicpoverty.org

These include Martin Ravallion's paper, Targeted transfers in poor countries: revisiting the tradeoffs and policy options.

For copies of Chronic Poverty Update and the first international Chronic Poverty Report (due February 2004) Email: cprc@devinit.org Tel: +44 1749 831141

Orphans in sub-Saharan Africa

A World Bank report about orphans in sub-Saharan Africa recognises older people as carers, and compares the situation of orphans living with grandparents, parents, older siblings or in other care environments.

Orphans in sub-Saharan countries: a framework for public action provides an overview of the issues pertaining to orphans and vulnerable children, and offers guidelines on approaches and interventions.

Throughout sub-Saharan Africa, the family remains the most common way of caring for orphans, says the report. In rural Tanzania, 95 per cent of orphans were cared for by relatives. A similar pattern was found in Uganda and Zambia.

But with the rapid spread of HIV/AIDS, uncles and aunts, the traditional first-choice substitute carers, are less available – either because they themselves have HIV/AIDS or because they are more reluctant to foster orphans – forcing grandparents and older orphans to take on this new role.

In many areas, grandparents appear to be the most common carers. In northern Uganda, 22 per cent of orphans living in households were cared for by their grandparents. In rural Tanzania, the proportion was 43 per cent.

The report summarises interventions by families and communities, community-based organisations and NGOs, and governments. It includes a comparison of costings and looks at the feasibility of scaling up.

Orphans in sub-Saharan countries: a framework for public action
Kalanidhi Subbarao and Diane Coury, World Bank Africa Region (Human Development) and Human Development Network (Social Protection), June 2003

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Who is caring for orphans		
Country	Sample covered	Carers
Northern Uganda (1997)	Districts of Arua, Soroti and Lira 2,119 orphans	43% Surviving parent 16% Uncles/aunts 22% Grandparents 19% Older orphans 3% Other relatives
Zambia (1996)	National survey	38% Grandparents 55% Extended family 11% Older orphans 6% Non relatives
Uganda (2001)	Luweero District 732 orphans	32% Grandparents 50% Surviving parent 16% Extended family 5% Non relatives
Rural Tanzania (2000)	Mawezi Regional Hospital 297 orphans	43% Grandparents 27% Surviving parent 15% Extended family 10% Older orphans 5% Community

Note: Most of the data comes from household surveys, and therefore excludes children living in streets or in residential care.

News round up

Developments that affect older people's quality of life

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Old age pensions in India



Older people face hurdles claiming pensions in Uttar Pradesh.

Amanda Heslop/HelpAge International

Older people are aware of the old age pension scheme, but eligibility criteria are poorly understood and application procedures are failing the majority, reports a survey of older people in Varanasi district, Uttar Pradesh.

The study, commissioned by the World Bank and coordinated by HelpAge India, focused on the administration of the old age pension scheme for poor older people in urban and rural areas of Varanasi.

A total of 1,105 older people took part in the survey, and interviews were carried out with government officials responsible for aspects of delivery at village, district and state level.

Cash transfers to poor people of over 65 years are made up from a nationally funded social assistance scheme and a state supplement. In Uttar Pradesh this brings the pension allowance to 125 rupees (US\$2) per month. The survey found evidence that applicants are persistent in their efforts to access this pension despite low success rates.

Ignorance about eligibility criteria and application procedures was evident among older people and the implementing officials closest to them. Given prevailing levels of literacy among older people in India (85 per cent of the survey sample classed themselves as 'illiterate'), the requirement for written application forms and supporting documents presents a considerable hurdle for the target group.

There is evidence that bribes are often expected and given at various stages of the application process. None of the unsuccessful applicants in this survey reported any understanding of why their claims had failed.

The study highlights the need for information on old age poverty in India. The old age pension scheme operates within a financial ceiling set nationally for each state. This limits the number of pensions that are available, and therefore requires a transparent system of determining eligibility. The survey indicates that the current system of means testing is confusing, and benefits only a fraction of those who believe they are eligible.

However, the study also demonstrates the widespread support among poor older people for the cash transfer pension scheme. A key issue for policy discussion is the feasibility of expanding coverage of the scheme. Policy options include the provision of a pension for all older people over a certain age. Further information on the cost of implementing the current system of means testing might provide further justification for simplifying administration of and expanding the old age pension.

Further research on the impact of the pension in receiving households is needed. Evidence from other studies indicates that measures targeted at older people can have considerable impact on poverty reduction (see Briefing on page 6).

The findings of the study and policy implications will be discussed with key stakeholders, including the government of India, during a seminar in Delhi next year.

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Channels of communication

Ways to improve older people's access to information about community services are recommended in a report from HelpAge Kenya.

A brief survey of 41 older men and women in and around Nairobi, from a range of socio-economic, educational and language backgrounds, found that older people wished to participate in decision-making but were hampered by various factors.

The report identifies viable means of communication. These are home visits, radio, religious organisation meetings, newspapers, community and public administration meetings, community-based organisations, senior citizens' organisations, television, mobile cinema, books and pamphlets, and non-formal adult education.

It recommends ways to maximise the potential of each of these communications channels, such

as developing best practice guidelines for community meetings, so that older people feel comfortable taking part.

Other recommendations include training for community-based and religious organisations; supporting senior citizens' groups; using broadcast media and involving older people in radio production; studying language use; and lobbying for adult education programmes to be more responsive to the needs and rights of older people.

The survey was funded by HelpAge International as part of its older citizens monitoring project (see A&D14).

Report of analysis of communication opportunities for older persons in Kenya
Kukubo Barasa, March 2003

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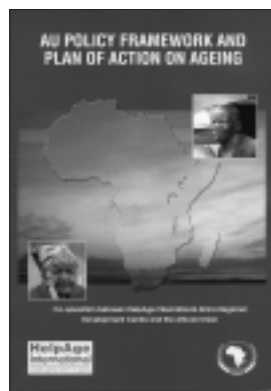
New guide to ageing policy in Africa

The AU Policy Framework and Plan of Action on Ageing is the result of several years' joint work by the African Union and HelpAge International's Africa Regional Development Centre.

The document, which received the final seal of approval at the AU Heads of State and Government session in Durban, South Africa in July 2002, provides a comprehensive guide for member states as they develop national policies and programmes to meet the needs of older people.

It identifies 13 key areas of concern to older people, including rights, poverty, health, food and nutrition, employment and income security, crises, emergencies and epidemics and gender.

It makes 29 recommendations to address these issues and identifies 184 specific actions to achieve the recommendations. It calls for the recognition of the rights of older people and their active participation in society and development.



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A summary can be downloaded from: www.helpage.org

Loneliness in Nepal

Older people's loneliness is one of the issues highlighted in a study of older people's lives in urban Nepal.

The study was undertaken by Nepalese NGO Child and Women Development Center, as part of a pilot project to improve the status of older people and help them feel included.

Discussions were held with older people and their families, including children, in middle and lower income groups in Lalitpur district, Kathmandu valley. The study looked at customs relating to older people and whether they are maintained; the generation gap and possible causes; and older people's health status and poverty.

It found that, although most older people lived with their sons, others lived alone or with their partner,

challenging the traditional system of families taking care of older people. Among older people living with their families, many had very little interaction with other family members, and they felt lonely and neglected.

Older people in transition: case study from selected urban areas of Lalitpur sub-metropolitan city

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Diary

■ A new report from the Food and Agriculture Organization and UNAIDS recognises the role of older people in agriculture in African countries worst-hit by HIV/AIDS, and calls for a shift from a production-based to a client-based approach. Among recommendations are lighter ploughs and tools. *Addressing the impact of HIV/AIDS on ministries of agriculture: focus on eastern and southern Africa* is available from the FAO website at: www.fao.org or UNAIDS website at: www.unaids.org

■ Indonesia has launched a national plan of action on ageing. Key points include mainstreaming ageing issues in all development programmes, establishing a coordinating body on ageing at national and local levels, and assessing how ageing programmes can benefit economic development. The date for making the plan law was 1 October, the UN Day for Older Persons.

■ A national coordinating committee for older persons has been established in St Lucia in order to develop and promote a national policy for older persons. It includes representatives from two government ministries – Health, Human Services and Family Affairs, and Social Transformation – local NGOs, the private sector, the St Lucia Media Workers Association, and HelpAge International.

■ Mauritius is one of few countries in the world that has a universal non-contributory pension scheme. A paper from the UN Department of Economic and Social Affairs examines the past and future of non-contributory, universal pensions in Mauritius, and draws lessons that might be useful for other countries, especially those in the developing world. *Mauritius: lessons for the rest of us* (discussion paper ST/ESA/2003/DP.32) is available on the web at: www.un.org/esa/esa03dp32.pdf or email: willmore@un.org



A report on agriculture and HIV/AIDS recognises older people's role.

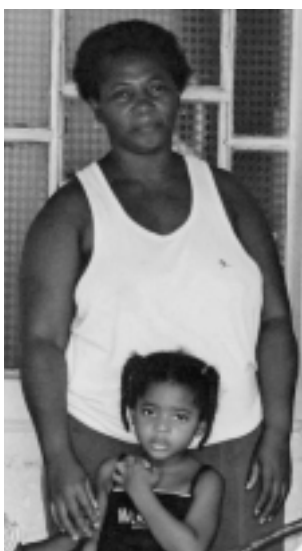
Briefing

Analysis of current topics in ageing

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Pensions for the poor?

A new study in Brazil and South Africa adds to the growing volume of evidence to suggest that non-contributory pensions have an important role to play in reducing poverty. Armando Barrientos and Peter Lloyd-Sherlock discuss the findings.



Non-contributory pensions reach 5.3 million poor older people in Brazil...

Helena Legido-Quigley/IDPM

Promoting the economic welfare of older people has emerged as an urgent priority for international development policy. Old-age poverty is widespread in developing countries, and informal old-age support is coming under increasing pressure from adverse economic conditions, migration, HIV/AIDS, and changes in household composition.

In the absence of policy interventions, older people and their households will continue to swell the ranks of the poor. Non-contributory pensions can play a key role in old-age support systems, but research and debate has focused mainly on contributory schemes.

In developing countries, these are limited to the minority of workers in formal employment.

Non-contributory pension programmes can be found in only a handful of developing countries, although they are more likely to have an impact upon poverty and vulnerability, and to facilitate economic development.

Pensions study

An international team of researchers undertook a study of non-contributory pension programmes in Brazil and South Africa, the two developing countries with the largest programmes. The study aimed to provide evidence about their impact on the wellbeing, participation and security of older people and their households, and to identify lessons for other developing countries, particularly low-income countries.

As part of the research project, the team interviewed key informants in Brazil and South Africa, and from a wide range of international organisations; carried out a survey of households with older people in urban and rural areas; and conducted in-depth interviews with older people. The information gathered provides a rich database with which to study the impact of non-contributory pension programmes on older people.

Main findings

The main findings to emerge from the research are:

- In both countries, pension benefits are shared within households. In Brazil, 83 per cent of those receiving pensions said they shared all the money with their families. In South Africa, 64 per cent share it all (see pie charts). Because of this, non-contributory pension benefits should be considered more appropriately

as household cash transfers.

- Non-contributory pensions have a significant impact on poverty. In the absence of non-contributory pension programmes, the poverty headcount (proportion of the population living in poverty) and the poverty gap (scale of their poverty) would be appreciably higher for households with older people. The impact on the poverty gap is much larger for poorer households. Non-contributory pension programmes significantly reduce the probability that individuals in households with a pensioner will be living in poverty.

- Non-contributory pension programmes reduce household vulnerability. Households with a non-contributory pensioner are more financially stable and less likely to experience declines in living standards.

- Non-contributory pension programmes promote older people's ability to lead an active life. Preliminary analysis of the findings shows that older people who receive pensions have a lower incidence of deprivations than those who do not, especially in urban areas.

- In both countries, non-contributory pension programmes reach a large number of poor older people (5.3 million in Brazil and 1.9 million in South Africa) at relatively low cost (1 per cent of GDP in Brazil and 1.4 per cent in South Africa). The programmes are financially sustainable and attract a large measure of political support.

Policy issues

Our findings suggest that establishing, or extending, non-contributory pension programmes in other developing countries could have a significant impact on reducing poverty and vulnerability among households with older people.



...and they reach 1.9 million in South Africa.

Helena Legido-Quigley/IDPM

Brazil and South Africa are the two developing countries with the largest non-contributory pension programmes, and these are reasonably well administered, have relatively low costs, and are politically and financially sustainable.

In low-income countries, with a limited tax base and weak administrative structure, the introduction of non-contributory pension programmes will require international support. Multilateral agencies such as the World Bank and the International Labour Office (ILO) are increasingly interested in the potential advantages of such programmes.

Recent initiatives, such as the ILO's Global Social Trust, are beginning to focus attention on the nature and extent of the international support needed. Further work needs to be done to consider more specific issues of programme design, administration, and financing.

The study provides further evidence about the effectiveness

of non-contributory pensions in preventing and reducing poverty in developing countries. The inescapable conclusion is that achieving the Millennium Development Goals requires urgent consideration about establishing and extending non-contributory pension programmes.

The research was funded by the UK Department for International Development.

The research team was led by Armando Barrientos, IDPM, University of Manchester, UK, and Peter Lloyd-Sherlock, SDS, University of East Anglia, UK. It also included Monica Ferreira, IAA, University of Cape Town, South Africa; Mark Gorman and Amanda Heslop from HelpAge International, London, UK; Helena Legido-Quigley, IDPM, University of Manchester, UK; Valerie Møller, ISEER, Rhodes University, Grahamstown, South Africa; João Saboia and Maria Lucia Werneck Vianna, IE, Universidade Federal do Rio de Janeiro, Brazil.

More information:

Project website
Contains information on the study, plus related papers and links.
<http://idpm.man.ac.uk/ncpps>

Full report

Non-contributory pensions and poverty prevention? A comparative study of Brazil and South Africa

Final Report, DFID Project R7897 Pensions and Poverty Prevention, July 2003, London

Available as a PDF on the project website (see above) or HelpAge International website:
www.helpage.org

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Making ends meet

'NSP' is a 75-year-old woman who lives in Rio de Janeiro, Brazil, with her 40-year-old daughter and two granddaughters, aged 19 and 8.

NSP's non-contributory pension is virtually the only source of income for the entire household. Her daughter is too ill to work – she has severe asthma and is frequently in hospital. The older granddaughter used to deliver leaflets, but lost all movement in her foot after an accident. The family receives a small school attendance grant for the younger granddaughter.

NSP obtained her pension as soon as she reached 65. Before then, the family relied on handouts from a local church. NSP says: 'The situation has improved a bit. At least, we now have enough money to buy food.'

Source: In-depth interview, Rio de Janeiro, April 2003.

Examples of non-contributory pension programmes in developing countries

Country	Type of pension	Age of eligibility	No of beneficiaries (thousands)	Expenditure (% of GDP)
Argentina	Means tested	70	113	0.23
Bangladesh	Means tested	57	403.1	NA
Bolivia	Universal but cohort restricted	65	NA	0.9
Botswana	Universal	65	71	0.4
Brazil	Urban social assistance	67	1,216	0.3
	Rural pension	Men 60 Women 55	6,024.3	1
Chile	Means tested	70	163.3	0.38
Costa Rica	Means tested	65	41.6	0.3
India	Means tested	65	2,200	0.01
Mauritius	Universal	60	112	2
Namibia	Universal	60	82	0.7
Nepal	Universal	75	192	NA
South Africa	Means tested	Men 65 Women 60	1,900	1.4
Sri Lanka	Means tested	No data	425.5	NA
Uruguay	Means tested	70	64.6	0.6

Beneficiaries figures are for 1999 except Argentina (2000) and Nepal (2001/2).

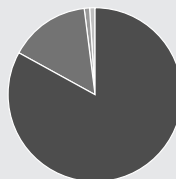
Sources include ILO, IPEA, ISSA, IDPM, UNDESA (references available on request).

Pension-sharing among non-contributory pensioners

How much of your pension and your own money can you keep for yourself?

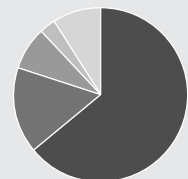
Brazil

None	83%
A little	15%
Some	1%
Reasonable amount	0%
All	1%



South Africa

None	64%
A little	16%
Some	8%
Reasonable amount	3%
All	9%



Source: Authors' calculations from household survey data.

Profile

Taking older people's interests forward

8

Taking a stand on elder abuse

Abuse of older people has only recently started to become recognised as a widespread and serious problem. Much of the credit for this must go to the International Network for the Prevention of Elder Abuse and, in particular, its first secretary, Professor Gerry Bennett.

The International Network for the Prevention of Elder Abuse (INPEA) was established at a round-table session of the 1997 World Congress of Gerontology in Australia. Its aim is to develop international collaboration to increase society's capacity to recognise and respond to the mistreatment of older people in whatever setting it occurs.

INPEA members, who number around 600 in 35 countries, are working to increase public awareness and knowledge of elder abuse, promote education and training of professionals, carry out advocacy, and stimulate research.

In the six years of its existence, INPEA has done much to get elder abuse onto health and development agendas. The organisation played a key role in ensuring that elder abuse was included in the Madrid International Plan of Action on Ageing. In adopting the plan at the Second World Assembly on Ageing in April 2002, governments have committed themselves to eliminate all forms of neglect, abuse and violence against older people.

INPEA is continuing to disseminate and promote the recommendations of the Madrid Plan of Action. A first step was the launch, with WHO, of the Toronto Declaration on the Global Prevention of Elder Abuse, devised at an expert group meeting hosted by the Government of Ontario in November 2002.

INPEA is now seeking to mobilise support in the United Nations General Assembly for the declaration of a World Elder Abuse Awareness Day in 2005.

INPEA has collaborated on the publication of several major reports. *Missing Voices*, focusing on elder abuse in developing countries, was launched at the research forum in Valencia which preceded the Second World Assembly on Ageing. INPEA also worked with WHO to publish the *World Report on Violence and Health* in 2002, and contributed to a report to the UN Commission for Social Development, *Trauma in War and Peace*, in 2002.

As awareness of the problem of elder abuse grows in many countries, INPEA has organised and participated in numerous conferences on gerontology and family violence.

'His enduring legacy will inspire us all to continue.'

*Bridget Penhale
INPEA representative for Europe*

Driving force

A driving force and inspiration behind INPEA was Professor Gerry Bennett of the Royal London Hospital, who developed and retained throughout his career a passionate commitment to the care of older people. Gerry Bennett's principal interests were elder abuse and chronic wound care, but he was also strongly committed to the academic specialisms of gerontology and medical education.

Having been a founder and first chair of the UK organisation, Action on Elder Abuse, Gerry helped to found INPEA and

became its first secretary, a position he held until his death in April 2003. In the words of vice-chair Elizabeth Podnieks, 'he quietly assumed a leadership role and became the expert architect of many of our policies and projects'.

Gerry coordinated the research that resulted in *Missing Voices*, and was one of the authors of the *World Report on Violence and Health* and the UN publication on trauma. He was WHO's main consultant on training and education in old-age care and chief advisor to its project to develop standards for old age care, emphasising the importance of human rights in older age.

'The teaching programme that Gerry established at his medical school in London was a model of innovation, vision and ground-breaking thinking,' says Alex Kalache, chief of WHO's ageing

and health programme. 'Based on it we developed new initiatives and publications – incorporating the life-course perspective, in which importance he believed as strongly as we do.'

As much as for his professional skills and vision, Gerry will be remembered for his warmth and friendship. 'He was a dedicated and generous teacher and a kind, caring and sensitive companion,' says Lia Daichman, chair of INPEA.

Though greatly missed by his friends and colleagues, the qualities that Gerry brought to INPEA will continue to drive it forward. 'Gerry was a source of inspiration and a great support to everyone who had the chance to work with him,' says Bridget Penhale, INPEA representative for Europe. 'His enduring legacy within elder abuse will inspire us all to continue.'

More information:

INPEA website: www.inpea.net

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Gerry Bennett retained a passionate commitment to the care of older people.

Talking point

Understanding older people's experience

9



Tim Judah/HelpAge International

In northern Mozambique, children and older carers are learning to understand each other.

Building bonds between carers and orphans

HIV/AIDS has increased the number of both orphans and older carers. Poverty, stigma and isolation can create tensions, but with some help, relations between old and young can be strengthened.

Older carers need economic support to keep children fed, clothed and in school. More than that, they and the children they care for also have to deal with grief and loss. Social ties and traditional support structures can be weakened by the stigma associated with HIV/AIDS.

Many older people feel that they are failing as carers, because they cannot protect their families from feeling ashamed and isolated.

Sezerina, a 60-year-old woman living near Juba, Sudan, has been struggling to provide for her niece and two nephews since her brother's death from AIDS. 'I am facing a hard time. I am repelled by my family, and the children keep telling me about the relentless comments they hear from their peers because of their parents' illness and death,' she says.

Older carers worry about what will happen to the children in their

care, after they die. 'My fear is that if I am not here, there will not be anybody to take care of them,' says Betty, 67 years, who cares for three grandchildren aged 14, 8 and 6 in Juba.

So far, the psycho-social needs of older carers and children have not received enough attention in HIV/AIDS interventions. Programmes addressing these issues are having some success in reducing tension and isolation.

Learning together

In Tete province, northern Mozambique, children are being encouraged to find out about their older carers' lives. Carers are helping children to make family folders containing photos and stories about their own and their grandchildren's lives.

These activities form part of the Living Together programme supported by HelpAge International and UNICEF.

The programme is helping children learn to treat older carers with respect, and raising older carers' awareness of the importance of playing with children and listening to them.

The programme also includes discussions in which carers and orphans use songs, story-telling and drawings to share their thoughts and feelings and build trust with each other.

Self-help clubs

In Thai Nguyen province, northern Vietnam, older people affected by HIV/AIDS have set up a self-help club with assistance from the Vietnam Women's Union.

The idea arose from a consultation on the impact of HIV/AIDS on older people's lives in Hanoi in 2002, facilitated by the Vietnam Women's Union and HelpAge International. 'People in this group suffer the same pain and the same circumstances, and we can

sympathise with each other,' said one of the participants.

The club provides a valuable space to exchange experiences and offer mutual support. 'This has been the best period in our lives for a long time,' said one older woman. 'We are so much healthier and happier now.' Local leaders are now planning to start similar clubs in other villages.

New report

These experiences from Sudan, Mozambique and Vietnam are included in a new report, *Forgotten families: older people caring for orphans and vulnerable children affected by HIV/AIDS*, published jointly by HelpAge International and the International HIV/AIDS Alliance.

The report shows that, provided appropriate support is available, older people and orphans and vulnerable children can overcome some of the challenges posed by the HIV/AIDS epidemic. Recommendations include fighting stigma and discrimination, more counsellors and community support for bereaved families, and support for older carers and children in planning for the future.

Numbers of older carers

- In 20 countries in Africa and Latin America, more than one-fifth of orphaned children are living with their grandparents.
- In South Africa and Uganda, the figure is 40 per cent, and in Zimbabwe, more than 50 per cent.
- In Zambia, Uganda and Tanzania, grandparents make up the single largest category of carers for orphans.

Source: World Bank

Forgotten families: older people caring for orphans and vulnerable children affected by HIV/AIDS

HelpAge International/International HIV/AIDS Alliance, 2003
Available from HelpAge International, London (address on back page).
Email: publications@helpage.org
The report can also be downloaded from the HelpAge International website at: www.helpage.org

Resources

New publications, websites, conferences and courses

10

Journal articles

A round-up of what is being written on ageing issues. For journal details please write to the editor or email: ctill@helpage.org

National

The transformation of Korean life: demographic trends and their social implications

T H Kwon, Soc. Indicators Res. 62:1 (April 2003)

The life of elderly people from different occupational backgrounds and their choice of eldercare patterns

L Ruojian, Chinese Sociology and Anthropology 34:2 (2002)

Survey and reflections on the state of care for the rural elderly in the underdeveloped central region (of China)

Z Yuanzhen, Chinese Sociology and Anthropology 34:2 (2002)

Modernisation and elder abuse in an Arab-Israeli context

H Litwin and S Zoabi, Research on Aging 25:3 (May 2003)

Characterising the elderly homeless: a 10 year study in Israel

Y Barak and A Cohen, Arch. Geront. and Ger. 37:2 (2003)

International

Old age poverty in developing countries: contributions and dependence in later life

A Barrientos et al., World Dev. 31:3 (2003)

Life span: evolutionary, ecological and demographic perspectives

J Carey et al., Pop. and Dev. Rev. 29:supplement (2003)

Older and poorer? Ageing and poverty in the South

A Barrientos and P Lloyd-Sherlock, J. Int. Dev. 14:8 (2002)

Health

Alcohol consumption among middle-aged and elderly men: a community study from Western India

P C Gupta et al., Alcohol and Alcoholism 38:4 (July 2003)

Living the golden rule: reciprocal exchanges among African Americans with cancer

J B Hamilton and M Sandelowski, Qualitative Health Res. 13:5 (May 2003)

Prevention and early intervention for vascular dementia in community dwelling elderly: findings from the Nakayama study

M Ikeda, Psychogeriatrics 3:1 (March 2003)

Disability-free life expectancy of elderly people in a population undergoing demographic and epidemiologic transition (Thailand)

S Jitapunkul et al., Age and Ageing 32 (2003)

Gender and rural-urban differences in reported health status by older people in Bangladesh

Z N Kabir et al., Arch. Geront. and Ger. 37:1 (July 2003)

Excess risk of early death in the elderly attributable to activities of daily living, mental status and traditional risk factors: the Shibata Elderly Cohort Study with a 20 year follow up

W Kushiro et al., Ger. and Geront. Int. 3:1 (March 2003)

A comparison of correlates of self-rated health and functional disability of older persons in the Far East: Japan and Korea

Y Lee and S Shinkai, Arch. Geront. and Ger. 37:1 (July 2003)

The health status of community based elderly in the United Arab Emirates

S Margolis et al., Arch. Geront. and Ger. 37:1 (July 2003)

An evaluation of universal health insurance in the elderly: burden of disease, utilisation and costs in the Republic of Korea

J Peabody et al., J. Aging and Health 14:2 (May 2002)

Examining the disablement process among older Mexican American adults

M K Peek et al., Soc. Science and Med. 57:3 (August 2003)

Mid-life smoking and late-life dementia: the Honolulu-Asia Ageing Study

S Tyas et al., Neurobiol. of Aging 24:4 (July 2003)

Study of the relationship between cigarette smoking, alcohol drinking and cognitive impairment among elderly people in China

H Zhou et al., Age and Ageing 32:2 (March 2003)

Ageing and nutrition in developing countries

A Dangour and S Ismail, Trop. Med. and Int. Health 8:4 (April 2003)

HIV/AIDS

'Retirement lost' – the new role of the elderly as caretakers for orphans in Western Kenya

E Nyambetha et al., J. Cross Cult. Ger. 18:1 (March 2003)

The impact of the AIDS epidemic on the health of older persons in northwestern Tanzania

M Ainsworth and J Dayton, World Dev. 31:1 (January 2003)

AIDS and older persons: an international perspective

J Knodel et al., JAIDS 33: supplement 2 (June 2003)

Migration

Nutritional risk factors for older refugees

S Pieterse and S Ismail, Disasters 27:1 (March 2003)

Wellbeing

Patterns of family support and the quality of life of the elderly (Korea)

I K Kim and C-S Kim, Social Indicators Res. 62:1 (April 2003)

Caregiver burden and health related quality of life among Japanese stroke caregivers

T Morimoto et al., Age and Ageing 32:2 (March 2003)

Sleep disturbances and depression in the elderly in Japan

T Sukegawa et al., Psych. and Clin. Neurosci. 57:3 (June 2003)

Quality of life of elderly Japanese patients with glaucoma

Y Uenishi et al., Int. J. Nursing Practice 9:1 (February 2003)

Quality of life of the elderly in Singapore's multi-racial society

G Wong, Int. J. Social Econ. 30:3 (26 February 2003)

Gender

Gender and disability among older adults in North and South India: differences associated with coresidence and marriage

M Sengupta and E Agree, J. Cross Cult. Ger. 17:4 (December 2002)

Value consensus and diversity between generations and genders (Korea)

E-Y Na and J Duckitt, Soc. Indicators Res. 62:1 (April 2003)

Reproductive and sexual health of older women in developing countries

Editorial, BMJ 327 (12 July 2003)

Heeding new voices: gender-related herstories of Asian and Caribbean born elderly women

F M Patterson, Affilia 18:1 (1 February 2003)

Gender differentials of the oldest old in China

Y Zeng et al., Res. on Aging 25:1 (Jan 2003)

Gender and elder care in China: the influence of filial piety and structural constraints

J Zhan and R Montgomery, Gender and Society 17:2 (2003)

Living arrangements of older women and men in Kuwait

N Shah et al., J. Cross Cult. Ger., 17:4 (December 2002)

Family

Transfers from older parents to their adult children in Taiwan and the Philippines

E Agree et al., J. Cross Cult. Ger., 17:4 (December 2002)

Rethinking Caribbean families: extending the links

M Chamberlain, Community, Work and Family 6:1 (April 2003)

Chinese family obligations towards chronically ill elderly members: comparing caregivers in Beijing and Hong Kong

E Holroyd, Qualitative Health Res. 13:3 (1 March 2003)

Hong Kong Chinese family caregiving: cultural categories of bodily order and the location of self

E Holroyd, Qualitative Health Res. 13:2 (1 February 2003)

Financial responsibility for the family: the case of southeast Asian refugees in Canada

P Johnson, J. Family and Econ. Issues 24:2 (2003)

The impact of changes in marital status on the mortality of elderly Japanese

C Nagata et al., Annals of Epidemiology 13:4 (April 2003)

Quality of life across life domains: family structure and relations

I Kyung Yang, Social Indicators Res. 62:1 (April 2003)

Intergenerational communication across cultures: young people's perceptions of conversations with family elders, non-family elders and same-age peers

H Giles et al., J. Cross Cult. Ger. 18:1 (March 2003)

Welfare and social provision

Public policy and extended families: evidence from pensions in South Africa

M Bertrand et al., World Bank Econ. Rev. 17:1 (June 2003)

Transforming China's urban health care system

B Guo, Asian Survey 43:2 (1 April 2003)

Admission to nursing homes in Taiwan

L-F Lui and A Tinker, Social Policy and Administration 37:4 (August 2003)

Labour market and social policies in the Baltic countries complete edition

OECD, OCDE Economies en Transition 7 (2003)

China's ageing, risk of the elderly and accounting for aged care
J Zhang, Managerial Finance 29:5-6 (1 May 2003)

Ageing and intellectual disability in Israel: a study to compare community residence with living at home
H Lifshitz and J Merrick, Health and Social Care in the Community 11:4 (2003)

Need for, availability of, and barriers to, the provision of long-term care services for older American Indians
L Jervis et al., 17:4 (December 2002)

Cross-cultural

Spirituality among older African Americans
T Armstrong and M Crowther, J. Adult Dev. 9:1 (January 2002)

Lifespan development revisited: African centered spirituality throughout the life cycle
E Wheeler et al., J. Adult Dev. 9:1 (January 2002)

Economic

Parents' needs, family structure and regular intergenerational financial exchange in Chinese cities
J Logan and F Bian, Sociological Forum 18:1 (March 2003)

The characteristics of countries with generational account imbalances
E Eschker, J. Comparative Policy Analysis 5:1 (March 2003)

Immigration, state support and the economic well-being of the elderly in Israel
A Lewin and H Stier, Research on Aging 25:3 (May 2003)

Reports and papers

Oxford Institute of Ageing working papers:

Age-structural dynamics and local models of population ageing in Indonesia
Working paper 103
P Kreager and E Schröder-Butterfill

Actual and de-facto childlessness in East Java: a preliminary analysis
Working paper 203
P Kreager and E Schröder-Butterfill

'Pillars of the family' – support provided by the elderly in Indonesia
Working paper 303
E Schröder-Butterfill

These papers are the result of the authors' research in rural areas of Indonesia. Each examines different aspects of the support given and received by older people in their family and community context. The authors' research challenges assumptions that older people always need the support of their children, who are always available to give it. They note the high levels of childlessness, and the wide range of factors which may inhibit caregiving and receiving between the generations. They highlight the central support role played by older parents for their children, which is frequently not reciprocated. These studies provide important detailed data on neglected aspects of intergenerational relations.

www.ageing.ox.ac.uk

Ageing and disability in the world of work: a critical overlap
N Breitenbach, ILO consultant
Presented at the ILO Tripartite Regional Conference 'The Restructuring of Disability Pensions', Prague, 12-13 December 2002
Email: nbreit@club-internet.fr

Obligation and inclusion: a look at EU development policy and practice
Discussion paper for BOND EU Assembly, 4 July 2003
S Beales, HelpAge International
www.bond.org.uk/eu/euassembly.html

Global aging: achieving its potential
AARP (2002)
www.aarp.org/international/Articles/a2003-04-15-globalaging.html

Shanghai implementation strategy
Regional implementation strategy aiming to provide guidelines on the implementation of commitments on ageing made under the Madrid International Plan of Action on Ageing and the Macao Plan of Action on Ageing for Asia and the Pacific.
UNESCAP (2002)
<http://unescap.org/sps/Shanghai%20Strategy%20Paper.pdf>

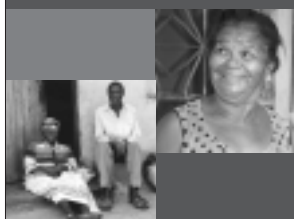
Globalisation and the future of ageing: economic, social and policy implications
C Phillipson (2002), Centre for Social Gerontology, Keele University, UK.
www.valenciaforum.com/Keynotes/cp.html

The deteriorating fiscal situation and an ageing population
National Bureau of Economic Research working paper no. w9367 (December 2002)
<http://papers.nber.org/papers/w9367/W>

Ageing and international capital flows
A Boersch-Supan et al. (2001), National Bureau of Economic Research
<http://papers.nber.org/papers/W8553.pdf>

Non-contributory pensions and poverty prevention

A comparative study of Brazil and South Africa
 September 2003



A new report looks at pensions for the poor (see page 6).

Abuse of older persons: recognising and responding to abuse of older persons in a global context
UNCSD (2002)
www.un.org/ageing/ecn52002pc2eng.pdf

Living arrangements of older adults in the developing world: an analysis of DHS household surveys
J Bongaarts and Z Zimmer (2001), Population Council, Policy Research Division working paper no. 148
www.popcouncil.org/pdfs/wp/148.pdf

The living arrangements of older adults in sub-Saharan Africa in a time of HIV/AIDS
Z Zimmer and J Dayton (2002), Population Council working paper no. 169
www.popcouncil.org/pdfs/wp/169.pdf

Ageing and social security: ten key issues
Contribution to the implementation of the Madrid International Plan of Action on Ageing. International Social Security Association (2003)
www.issa.int

Books

Ageing in Africa: sociolinguistic and anthropological approaches
S Makoni and K Stroeken (eds) Ashgate (2003), 290 pp.
www.ashgate.com
An essential addition to the field of ageing with fresh perspectives from anthropology and linguistics. This collection of research presents authentic insider views on the experience of ageing from a range of communities in East, Southern and West Africa.
 ISBN 0 7546 3004 8

Ageing and poverty in Africa: Ugandan livelihoods in a time of HIV/AIDS

A Williams
Ashgate (2003), 256pp.
This book describes the lives of elders in a very poor rural community in Buganda, Uganda. The author, using observation and participatory research techniques, explores individual livelihoods from a life-course perspective. With descriptions by the villagers themselves throughout, this in-depth study explores the impact of HIV/AIDS on older people's tangible assets, health, social status and relationships.
 ISBN 0 7546 3180 X

Ageing and long-term care: national policies in Asia-Pacific
D Phillips and A Chan (eds) Institute of South East Asian Studies and International Development Research Centre (2002)
The context for this volume of five case studies is the rapid demographic ageing and dramatically changing social and economic situation of the region. The five countries (Hong Kong, Korea, Malaysia, Singapore and Thailand) were chosen to be representative of different aspects of the ageing situation, and each chapter looks both at the development of national ageing policy and long-term care policies as well as how these match up to current practice. This is a timely review of the challenges facing policy makers where existing expectations of substantial family care for older people are being undermined by rapid social change.
 ISBN 9812 301739

Health and well-being for older people
A Squire
Elsevier Science (2002), 376 pp.
Handbook for health promoters, emphasising positive aspects of ageing and participation of older people.
 ISBN 0 7020 2315 9

Course

Ageing in Africa
For programme managers, social workers, senior government officers and healthcare professionals, covering demographics, HIV/AIDS, gender, poverty, research and policies on ageing.
 16-20 February 2004, Nairobi, Kenya
 US\$400 (including accommodation) or US\$150
HelpAge International Africa Regional Development Centre, PO Box 14888, Westlands, 00800 Nairobi, Kenya.
 Fax: +254 20 4441052
 Email: helpage@africaonline.co.uk

Research update

Major new projects

12



John Cobb/HelpAge International

A survey in Tanzania highlights the severe poverty that HIV/AIDS plunges families into.

Chronic poverty in Bangladesh

A desk study of chronic poverty and older people in Bangladesh has been completed and a draft report prepared.

The study, coordinated by HelpAge International and the University of Dhaka, focuses on vulnerable older people's social capital (including indigenous networks and institutions) and the impact of any existing public social protection programmes on chronically poor older people.

It forms part of a DFID-funded programme to research chronic poverty, being carried out by the Chronic Poverty Research Centre, University of Manchester, UK, and academic institutions and NGOs.

The report, due in 2004, will highlight areas for targeting poverty reduction strategies, and identify possible indicators, based on older people's own experiences, that can be used to monitor the inclusion of older people in poverty reduction strategies and measure their success.

Contact:

Amanda Heslop, Training and Research Manager, HelpAge International, London.
Email: mheslop@helpage.org

Unmarried men in Thailand

Two new reports from the project 'Socio-demographic impact of AIDS on the elderly' in Thailand, funded by the US National Institute on Aging, have been published.

Sex and the single (older) guy: sexual lives of older unmarried Thai men during the AIDS era (PSC research report 03-536, June 2003) by Mark VanLandingham and John Knodel investigates sexual activity of older unmarried Thai men, mainly in their 50s. It concludes that risks of acquiring and spreading HIV do not appear to be great, but cannot be ruled out, given how little is known about the sexual behaviour of unmarried men in this age group.

Data collection strategies for studying the impacts of AIDS on older parents: lessons from research in Thailand (PSC research report 03-537, June 2003) by John Knodel, Mark VanLandingham, Chanpen Saengtienchai, Wassana Im-em and Jiraporn Kespichayawattana reviews methods of collecting data about parents of adults who become ill and die of HIV/AIDS, assesses different strategies used, and draws lessons for researchers who might wish to conduct related studies in other settings.

Contact:

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Email: jknodel@umich.edu

The reports can be downloaded from: www.psc.isr.umich.edu/pubs (click on Current Research) or obtained from: PSC Publications, Population Studies Centre at the address above.

HIV/AIDS in Tanzania

Preliminary findings from a survey of forty carers aged 50 and over in Dar es Salaam highlight the severe poverty which HIV/AIDS plunges families into, and the stresses placed on family relationships.

The study points out the lack of information for older people about government services, and lack of education about HIV/AIDS prevention and care. It also discusses the psychological effects of HIV/AIDS on older carers.

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Email: haitz@africaonline.co.tz

We welcome brief details of current research. Please write to: The Editor, Ageing & Development or email: cstill@helpage.org

HelpAge International is a global network of not-for-profit organisations with a mission to work with and for disadvantaged older people worldwide to achieve a lasting improvement in the quality of their lives.

Ageing and Development aims to raise awareness of the contribution, needs and rights of older people and to promote the development of laws and policies supporting older people. It is published three times a year by HelpAge International, with funding from Help the Aged (UK).

Copies are available in English and Spanish, free of charge on request to policy makers, programme planners and researchers. Please contact us with brief details of your work. If requesting multiple copies, please explain who these are for and how they will be distributed.

Ageing and Development is also available on the web at: www.helpage.org

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