

**HelpAge
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**Mid-term Evaluation of the EU
awareness-raising project
“Decent Work for All: Promoting Older
Workers Inclusion”
(ONG-ED/2007/146-096)**

Prepared by Costanza de Toma
Independent Evaluator
Advocacy etc.

December 2010

HelpAge International
PO Box 32832
London N1 9ZN, UK
Registered charity no. 288180
Front cover photo: Antonio Olmos / HelpAge International

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Executive Summary and Fourteen Recommendations

This is the mid-term evaluation report for the project “*Decent Work for All: Promoting Older Workers Inclusion*” implemented by HelpAge International (HelpAge) and partners with funding from the European Union. This report assesses progress made to date on the project’s objectives and tracks outcomes achieved in its five main result areas. The project’s advocacy outcomes are analysed through a ‘Theory of Change’ approach focusing on the contribution by this action towards achieving lasting change in policy and practice on social protection and decent work at the European level. Project implementation is analysed by looking at evidence gathering, ways of working among implementing partners and materials and tools developed as part of the project.

This summary provides an overview of achievements and areas for reflection under each of the project’s five results areas as outlined in the project proposal and the logical framework. This will be supplemented by additional information on project activities provided by HelpAge International and other implementing partners in the final project report. Fourteen recommendations are also presented in order to inform thinking on the way forward for HelpAge and its partners.

RESULT 1

Experiences of old-age informal sector workers collected and translated into appropriate messages for awareness-raising.

This result, which constituted ‘phase I’ of the project, was achieved in years one and two. This evaluation identified three issues that may require further reflection by HelpAge and its partners.

Achievements

- The project effectively contributed to building a new body of evidence to show the magnitude and the issues of older people working in the informal sector in poor countries in the South.
- Southern partners played a key role, with support from HelpAge, in leading the evidence gathering exercise at the national level with a view to compiling national briefing papers.
- All the evidence, including the individual case studies, was collected in a participatory way involving direct consultation with local older people’s groups through focus group discussions in the three study countries (Bangladesh, Peru and Uganda). This was captured in the national briefs and then aggregated in the Global Report in 2010.
- Key messages on the experiences of older workers were effectively conveyed through reports produced as part of the project (‘Working for Life’, ‘Forgotten Workforce’, and ‘Unreported Lives’) as well as in the country briefs. They were also powerfully captured in the photographic material and in the individual case studies gathered in these three countries.

Areas for Reflection

- Despite playing a crucial role in gathering evidence in-country, Southern members were not involved in designing the research methodology or in drafting questions for the focus group discussions.
- European partners were not actively engaged in this first phase of the project although they were expected to integrate resulting messages and asks on decent work within their national contexts later in the project.
- Most of the evidence collected was qualitative. There was an overall dearth of quantitative and comparative data on this issue that HelpAge did not manage to bridge through this project. As a result, translating the available evidence into appropriate messages for awareness raising and policy influencing was a challenge at times.

RESULT 2

Civil society representatives and spokespeople articulate older workers priorities and engage with critical audiences in at least five EU member states.

This result was partly realised through spokespersons' tours in three EU member states aimed at supporting awareness-raising and policy influencing activities in these countries as well as generating media attention.

Achievements

- Three spokespersons' tours were organised to coincide with the work around the Czech and Spanish Presidencies of the EU in the second and third years of the project (2009-2010).
- Spokespeople were relatively well versed in the subject area and they managed to convey national as well as individual realities of the situation of older workers in their countries.
- All three spokespeople came in contact with key political actors and decision makers during their visits.
- Two of the three spokespeople were interviewed by national media during their tours.
- All three felt that their visits had been useful in order to convey their knowledge and experiences to audiences in Europe that they wouldn't otherwise have reached.

Areas for reflection

- Spokespeople visited three EU member states and not five as envisaged in the project proposal.
- The value added of spokespersons tours was questioned by European implementing partners. They felt that the significant investment required in time and resources to organise the tours was ultimately not matched by the political 'mileage' and media coverage they got out of the visits.

RESULT 3

Through networking and alliance building a shared civil society platform supporting the Decent Work Agenda (DWA) in EU development policy is formed.

Overall, HelpAge and its European partners were successful in forging new strategic alliances with civil society actors and mobilising support within their national contexts and at the European level. Their input and engagement, however, focused mostly on social protection issues and to a lesser extent on the DWA.

Achievements

- HelpAge's efforts to work collaboratively and seek to establish strategic alliances with other civil society actors is perceived to be what sets them apart from other NGOs.
- HelpAge took on a leading role within the European Working Group on Social Protection and Decent Work.
- Over the past two years, the group has grown in importance and has achieved increased recognition among key stakeholders and they participated in important consultation and decision-making processes.
- In the Czech Republic, Zivot 90 managed to consolidate its relationship with the national Development NGO platform (FoRS) actively participating in their 'EU presidency project' from its inception in 2008. They also established new relations with Sue Ryder International with whom they partnered on inclusive development issues.
- HelpAge Deutschland made contact with a number of German NGOs as well as the national NGO platform, VENRO. In 2008, they were invited to join the German working group on 'Social Cash Transfers', increasing their profile and developing strong relationships with its members and key external targets.
- In the UK, HelpAge conducted most of its advocacy collaboratively in the UK through the Grow Up Free From Poverty coalition. This was the main vehicle for influencing the Department for International Development (DFID) and the UK government. The EU Policy Adviser also actively participated in meetings of Bond's (the UK's national development NGO platform) European Policy Group.

Areas for Reflection

- Despite consolidating the relationship with the ILO, relations with the labour movement in Europe were not developed until very late in the project and are mostly still at an 'exploratory' stage.

RESULT 4

In Belgium, Germany, Czech Republic, Slovenia, and the UK development actors have better awareness of ways to support older informal workers in developing countries through their ODA interventions.

HelpAge and its European partners have made significant advances towards achieving this result during the life of the project. Overall, there is evidence to suggest that they were successful in raising awareness of

social protection and decent work issues (albeit, to a lesser extent) among European development actors as well as putting social protection on the agenda. They have been less successful at achieving *lasting* change in policy and practice in these areas due to external political factors including, for instance, changes of government in the UK and in Germany over the past year.

Achievements

- The focus on the EU Presidencies (Slovene and Czech) provided useful opportunities for greater participation by European partners in national CSO platforms as well as effective entry points for targeted awareness raising activities in-country.
- HelpAge also managed to target the Spanish Presidency of the EU during the first half of 2010.
- HelpAge is widely perceived to have played a significant part in keeping social protection on the EU agenda since 2008. Through their collaborative work with the EU Working Group on Social Protection and Decent Work they managed to influence EuropeAid to include social protection in their aid programming at the national and regional level as well as including it in calls for proposals open to civil society organisations.
- The EU Working Group influenced a European Commission internal paper on social protection and contributed to shaping the content of the European Report on Development 2010, which focused on social protection in Sub-Saharan Africa.
- In the Czech Republic, Zivot 90 participated actively, as an associate member of FoRS, to consultations on the development of the Czech Development Strategy for 2011-2015.
- In Germany, bilaterally, and as members of the Working Group on 'Social Cash Transfers', HelpAge Deutschland developed strong relations with key officials in GTZ (German technical cooperation agency), in BMZ (the German Development Ministry) as well with the former German Development Minister and with influential German parliamentarians championing social protection.
- Through their high-level advocacy, HAD made an important contribution by securing references to human rights, social cash transfers and older people in the former German government's social security concept.
- In the UK, HelpAge targeted the Department for International Development (DFID) bilaterally and collaboratively through Bond and the Grow Up Free From Poverty coalition in order to influence their white paper 'Eliminating World Poverty: Building our Common Future' in 2009. In the white paper DFID pledged to "*help build social protection systems to get help to 50 million people in over 20 countries*" from 2009 to 2012.

Areas for Reflection

- The decision by HelpAge to focus this action on the DWA as a framework for its existing work on social protection appears to have been internally contested while not being fully appreciated externally. European partners have also struggled with the concept of decent work and the DWA.

- Awareness-raising on decent work in the UK seems to have failed to take off until very late in the project.
- Decision makers and key stakeholders in the UK were never consistently targeted on decent work issues other than as a vehicle for channelling messages on social protection.
- Slovenia has been a very passive associate in the project due to a combination of human resource constraints and the failure to obtain a visa for the Ugandan spokesperson to visit the country during the Slovene presidency of the EU in 2008.
- Despite significant achievements by HelpAge and its European partners both in Brussels and in three EU member states, they have ultimately fallen short of achieving *lasting* change in policy and practice.
- Favourable policies on social protection in the UK and Germany are now potentially under threat following changes of government in both countries over the past year. The new governments in both countries are currently focusing on economic growth and are prioritising interventions with strong 'value for money'.
- Despite securing significant support for an EU policy on social protection among lower-ranking European Commission officials, senior managers, including Commissioner Piebalgs himself, are still to be convinced this is a priority.

RESULT 5

Messages on all the above are available to the wider development public via websites, media and newsletters.

This dimension of the project was by far the weakest. Despite setting the standard with their high-quality publications, HelpAge and its European partners have somehow failed to reach out to mass public audiences as envisaged in their project proposal. This is due to a number of factors as outlined below.

Achievements

- External feedback on HelpAge publications was excellent all round. HelpAge's newsletter, 'Ageing and Development', was often quoted as a useful resource by external informants alongside thematic reports and briefs drafted under the project.
- Briefings produced by the EU Working Group on Social Protection and Decent Work, particularly to inform the debate on the recent European Report on Development, were also considered to be very useful.
- HelpAge and its European partners also developed web-based materials and interactive resources on decent work with funding from this project. These were all developed during year two (2009) of the project. The websites are meant to provide public access to all the materials developed as part of the project as well as links to the 'flickr' website for viewing the photographic exhibition.
- Old people's blogs and videos have been singled out by respondents as the most innovative aspect of HelpAge's new web-based resources. Video blogging was successfully trialled by Mrs. Kabango during her visit to the Czech Republic in 2009. It has now been taken up more widely by HelpAge as an empowering tool for older people.

- The photographic exhibition on older informal sector workers produced under the project was successfully mounted in Prague during the Czech Presidency of the EU attracting over 2500 visitors over one month.
- Some media coverage was achieved in specialist media outlets through relevant NGOs and networks in Brussels and in the member states.
- There was also some pick up by Southern media outlets, particularly on occasion of the launch of the Global Report in May 2010. This also generated some media interest in the UK.

Areas for Reflection

- The ambitious vision of using HelpAge and HelpAge Deutschland's websites as 'key portals' for mass public campaigning in Europe and the South has not been fully realised yet. Thus far, web-based resources and portals have failed to attract the volume of online traffic envisaged in the proposal.
- For instance, HelpAge's 'Decent Work Quiz' (on their decent work pages) had received a total of 170 hits by mid November 2010. Similarly, three months since the launch, only about 200 people had viewed the social protection and decent work pages on the HelpAge website. This is well below expectations.
- Some European partners felt that the Global Report and the media brief came too late in the project failing to support their advocacy and public awareness work at the national level. They also feel that these materials were not easily accessible to the wider public in their countries as they were in English.
- Although the photographic exhibition was meant to attract mainstream media and the wider public, it does not yet appear to have yielded the expected results in terms of media attention or public exposure. Uptake in Germany has been far slower than expected and it is only now beginning to pick up. To date, the exhibition has not been shown in the UK or in Brussels.
- The failure by Age UK to embrace the Decent Work Agenda thwarted public influencing and media work in the UK.
- Engagement with European media was not realised to the extent and scale outlined in the project's proposal either. There was no significant media coverage in Brussels and limited coverage in the Czech Republic, in Germany and Spain mostly coinciding with the spokespersons tours during the second year of the project.

Recommendations

1. HelpAge should take stock of lessons learnt from this action and re-evaluate its expectations at the EU level taking into consideration the resources at its disposal in the Brussels office.
2. Set realistic expectations for future awareness-raising work at the EU and in EU member states.
3. With the DWA having lost momentum recently, HelpAge should re-assess the strategic value of continuing to focus on the Decent Work Agenda at EU and member states level.
4. HelpAge should review its media engagement on social protection and decent work in the UK.
5. HelpAge should rely on external technical assistance for building its knowledge on European media and developing a strategy outlining strategic engagement in this area.
6. Future awareness-raising actions of this ambition and magnitude should be supported by an overarching advocacy and communications strategy including a media component.
7. The role of HelpAge's European partners within awareness-raising and advocacy work in Europe should be re-assessed with a view to actively building their advocacy capacity for future engagement.
8. A decision on whether or not to invest more resources in establishing strategic partnerships with the labour movement both in Europe and in the South should be informed by a broader reflection on the way forward in HelpAge's livelihoods work, which is intrinsically tied to the decent work concept.
9. HelpAge should mobilise higher level political support for social protection and other ageing related issues at the European Commission. This should comprise higher senior involvement from HelpAge Headquarters.
10. HelpAge and its European partners should develop stronger relations with the European Parliament targeting MEPs from focus countries in Europe as well as in Brussels.
11. In light of the recent re-structuring of the policy and communications departments, HelpAge should ensure that the division of labour between the two teams is clarified and taken into account when developing new projects.
12. Organise an end of project evaluation workshop involving all partners in order to assess achievements, look at ways of working and lessons learnt. This should inform any future proposals for similar actions.
13. The development of digital communication tools and the use of interactive video and blogs for advocacy and campaigning in Europe by HelpAge should be guided by an overarching digital marketing plan supplementing advocacy and communications strategies.
14. As HelpAge invests more in its digital communications they should review the role of e-campaigning tools in their future advocacy work.

1. Background and Framework for the Evaluation

1.1 Introduction

This is the mid-term evaluation report for the project “Decent Work for All: Promoting Older Workers Inclusion” implemented by HelpAge International (HelpAge) and partners with funding from the European Union. The intervention started in May 2008 and it is due to end in April 2011. Despite being a mid-term review, this report focuses on the period between May 2008 and November 2010, thus almost covering the entire life of the project. The evaluation was delayed due to staff changes in Brussels over the past year and a consequent delay in project implementation. The report aims to provide a review of the action with evidence-based recommendations for HelpAge International and its partners. This report is based on significant desk research to review project documents and relevant materials as well as on semi-structured interviews with key stakeholders. The research was conducted between September and November 2010.

1.2 Purpose and Scope of the Evaluation

The purpose of this review is to provide HelpAge and its partners with pragmatic and forward-looking recommendations in order to inform future awareness-raising and policy influencing in Europe. It is hoped that this may foster a reflection on the extent of achieving project objectives, what worked well and why and what worked less well and why. The review also offers some suggestions on the way forward for HelpAge and its partners in their advocacy on social protection and decent work at the European level. The terms of reference for this evaluation were:

- To assess progress in meeting the overall and specific objectives of the project;
- To review methods of engaging with the target groups and whether they were appropriate, effective and are the best use of resources and the capacities of project partners;
- To review ways of working with partners;
- To provide forward-looking recommendations for the development of HelpAge’s work in social protection and livelihoods at the European level.

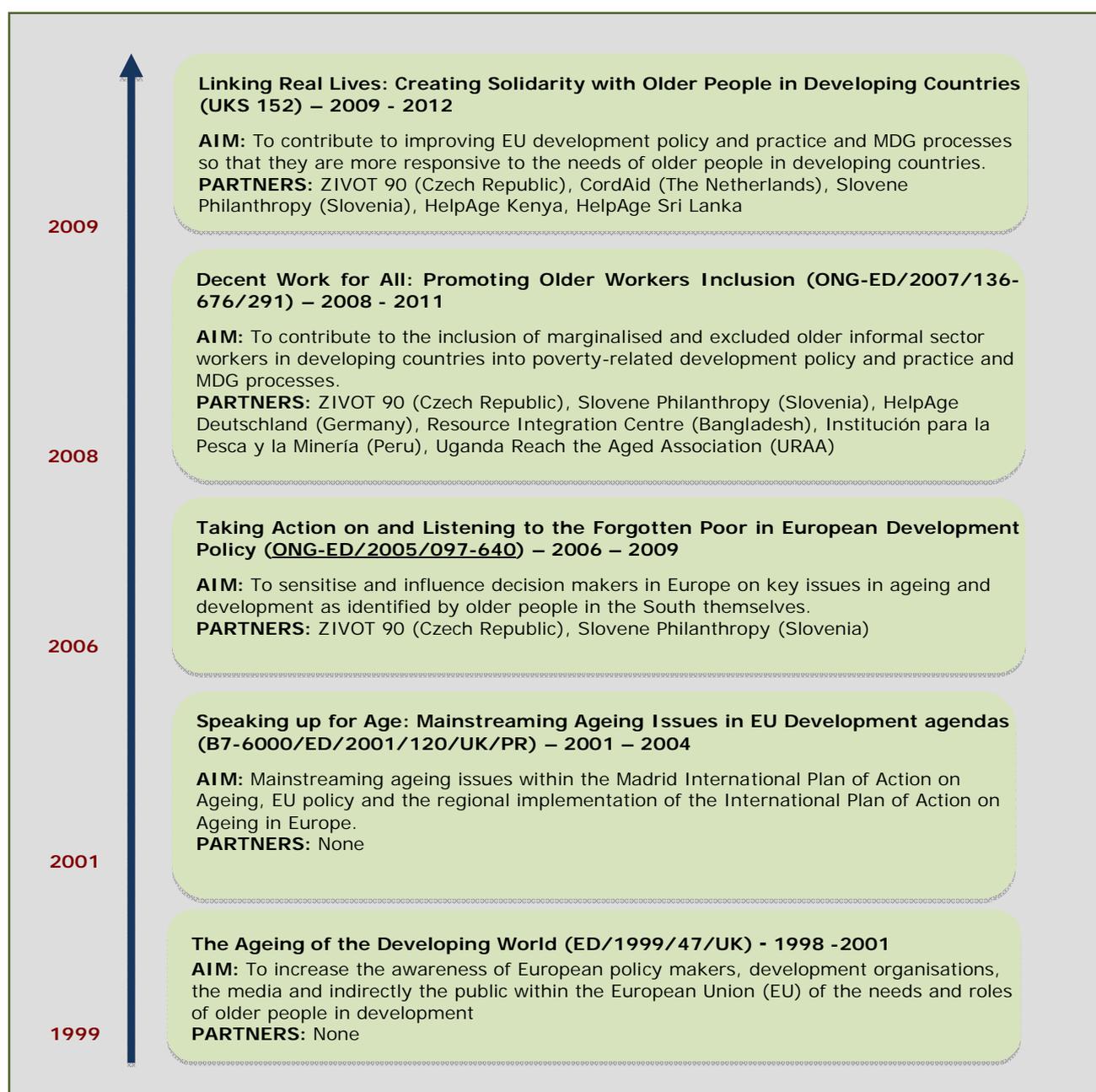
The first part of the report focuses on the extent to which this project has contributed to achieving change in social protection and decent work in policy-making processes at the EU and in selected EU member states. The second part of the review focuses on project implementation and co-ordination. Key achievements and areas for reflection, as well as recommendations, are outlined under each section.

1.3 Background and Context

This project built on past and ongoing HelpAge awareness-raising work to influence policy-making processes in Europe. Box 1 (below) outlines previous and ongoing interventions aimed at putting ageing on the development agenda in Europe over the last decade.

Previous reviews of EU funded awareness-raising interventions by HelpAge (Bedlington 2002/2003 and Holden 2009) show that in the past eleven years HelpAge has come a long way in establishing itself as a widely recognised agent for change on ageing and development on the European stage, and internationally. Initially focusing on the production of materials like the 'Ageing and Development Report' in preparation for the 2nd World Assembly on Ageing (Madrid 2002), Holden (2009) noted that HelpAge strengthened its strategic, and rights-based, approach to advocacy through the years. They have also made increasingly better use of

Box 1: HelpAge International's EU awareness raising projects 1999-2010



their presence in Brussels and of their international network of partners. Project reports show that they have empowered older people to voice their views to decision makers and opinion formers in Europe in person at key events such as the World Assembly on Ageing in Madrid (2002) and during the development of the European Regional Plan of Action on Ageing in Berlin (2002). As their advocacy work matured and their rights focus was sharpened, in the predecessor project to the one under review, HelpAge took on topical issues such as inter-generational poverty and HIV/AIDS. Themes were identified in consultation with partners as they were considered to be central to older people's lives and very topical. This thematic focus allowed HelpAge to build strategic alliances with other NGOs and international networks such as Save the Children, Action on Disability and Development and UNICEF and paved the way for their work on social protection and social pensions. The focus on the decent work agenda (DWA) as part of this project, provided HelpAge with a broader policy framework for their ongoing work on social protection allowing them to strengthen their engagement with the EU, international donors and the International Labour Organisation (ILO) as well as exploring innovative alliances with other NGOs and trade unions in Europe and internationally.

Overall, previous reviewers found that HelpAge have been successful at raising awareness of older people's issues among key audiences in Europe thus contributing to putting ageing and inter-generational poverty on the agenda. It was also recently noted (Holden 2009) that social protection had emerged as the predominant area for HelpAge advocacy and had gradually become a *"central issue for poverty reduction and the wider development debate"*.

1.4 Methodology

The methodology and assessment for this mid-term evaluation was composed of a number of strands:

- Semi-structured interviews with key internal stakeholders in HelpAge's Secretariat in London.
- Semi-structured interviews with implementing partners in Europe (affiliates of HelpAge's International Network).
- Semi-structured interviews with implementing partners in the South.
- Semi-structured interviews with key external stakeholders in Brussels, Germany and the Czech Republic.
- Conducting a desk review of all project documents including project proposal, reports, notes from project meetings and documents referring to preceding projects.
- Review of all materials produced as part of the project.

Assessment of the project's advocacy outcomes was conducted by using a 'Theory of Change' approach. Progress in achieving the advocacy outcomes of this intervention was analysed by focusing on four key steps

along a 'pathway of change', namely: (a) establishing HelpAge's and its partners' status and credibility vis-à-vis their target audiences; (b) raising awareness of social protection and decent work issues among target audiences; (c) putting the issues on the European agenda (in Brussels and in selected EU member states); and (d) achieving lasting change in policy and practice.

1.5 Acknowledgements

I would like to thank all those consulted for their time and their willingness to share their learning, views and suggestions on this project. I am particularly grateful to Alice Livingstone and Astrid Walker Bourne for their assistance and guidance.

2. Achieving Change

This part of the evaluation report looks at the project's advocacy activities aiming to assess to what extent these may have contributed to: (a) establishing HelpAge's and its partners' status and credibility vis-à-vis their target audiences; (b) raising awareness of the issues among target audiences (with a view to building constituencies of support); (c) putting the issues on the agenda; (d) bringing about lasting change in policy and practice. This section is structured around these key headings.

2.1 What the project set out to do

Following on from a preceding action (ONG-ED/2005/097-640 – 2006-2008) focusing on key thematic issues around ageing and development, this project narrowed the focus to issues relating to decent work and social protection.

Taking the ILO's Decent Work for All Agenda (DWA) as its starting point, HelpAge International set out to raise awareness of the plight of older informal sector workers in developing countries. The project's overall objective was *"to contribute to the inclusion of marginalised and excluded older informal sector workers in developing countries into poverty-related development policy and practice and MDG processes"*.

The DWA has been upheld as the key policy agenda of the International Labour Organisation since 2000. It aims to promote employment and improve working conditions. It has four themes, or pillars: 1) creating productive and freely chosen work; 2) promoting rights at work; 3) extending social protection and 4) promoting 'social dialogue' and conflict resolution. Gender is a cross-cutting theme in the DWA.

Following the endorsement, and adoption, by the European Union (EU) of the DWA in 2006, this project highlighted the importance of the DWA's third pillar, focusing on social protection, to the end of providing recommendations to the EU for the implementation of the DWA in developing countries. The project aimed to *"ensure that the needs and contributions of older informal sector workers in developing countries [were] recognised and taken into account by European Development actors advocating for, and responsible for, developing and implementing the DWA and wider poverty-reduction interventions"*.

Through this project HelpAge and its European partners targeted a number of audiences ranging from European policy-makers and opinion formers, development NGOs, CSO networks and the media in Brussels and across four EU member states (Germany, Czech Republic, Slovenia, and the UK). Specifically, the project aimed to achieve the following results:

1. Experiences of old-age informal sector workers collected and translated into appropriate messages for awareness-raising.

2. Civil society representatives and spokespeople articulate older workers priorities and engage with critical audiences in at least five EU member states.
3. Through networking and alliance building a shared civil society platform supporting DWA in EU development policy is formed.
4. In Belgium, Germany, Czech Republic, Slovenia, and the UK development actors have better awareness of ways to support older informal workers in developing countries through their ODA interventions.
5. Messages on all the above are available to the wider development public via websites, media and newsletters.

2.2 Establishing status and credibility vis-à-vis target audiences

"[HelpAge International] are internationally recognised for the work they do. Things would have been different if they hadn't been around."

"They play to their strengths as they speak from experience. We take them seriously."

Achievements

Leading the way on social protection

Feedback from external informants interviewed for this evaluation demonstrates clearly that HelpAge International are extremely well established in Brussels both among civil society and vis-à-vis EU decision makers, particularly at the European Commission. This project contributed to consolidate their reputation as respected interlocutors on ageing and development and especially on social pensions and social protection more widely.

"Efficient", "pragmatic", "remarkable", "an example for others", "professional", and "effective" are just some of the words used to describe HelpAge and their work. As one informant noted: "They attend all the meetings, they are everywhere. If you are serious about social protection that's the way to do it". However, as was also interestingly remarked: "You can't just go in a meeting and talk about older people, no one would be interested". The focus on decent work and social protection provided HelpAge with a very good entry point and a powerful hook for their rights-based advocacy. This enabled them to build upon their broader awareness-raising of ageing and development issues while securing an advocacy niche on social protection for themselves in Brussels and in the international arena.

Championing the collaborative approach

However, what seems to underpin HelpAge being broadly “well regarded” are their efforts to work collaboratively and seek to establish strategic alliances with other civil society actors and institutions, like for instance UNICEF and the ILO. This is perceived by some to be what sets them apart from other NGOs. Their broader and inclusive approach to social protection offered a very pragmatic and effective way of mainstreaming ageing issues and building synergies with other relevant actors. HelpAge’s partners and targets alike appreciate the way “*they combine an analytical approach with good practices on the ground*”. Their broad network of partners and programmes in the South, and particularly their strong presence in Sub-Saharan Africa, are also seen as key to their added value. This has strengthened their credibility and has earned them a seat at the table in Brussels.

Doing more with less

What HelpAge has managed to achieve with very limited human resources in their Brussels office has been truly remarkable. This has prompted remarks such as: “*they seem to have a lot of resources..... I’m always amazed at the amount of resources they must have!*” from an EC official in Brussels. Part of HelpAge’s reputation in Brussels stems directly from positive contributions by their EU Policy Adviser, a role which has been covered by a succession of very professional and capable advocates in recent years. The former EU Policy Adviser, Kamala Truelove, was commended for her role and her approach by several external stakeholders interviewed. It was also noted that despite a gap due to delays in filling the post after Kamala left earlier this year, the new EU Policy Adviser (Ellen Graham) has already started re-establishing HelpAge, successfully bridging that gap.

Areas for reflection

Setting realistic objectives and expectations

Despite remarkable contributions by HelpAge and its partners’ staff, it has to be noted that their advocacy potential is ultimately affected by their limited human and financial resources. This is particularly true for HelpAge’s partners in the Czech Republic, Slovenia and Germany. In Brussels in particular, however, HelpAge could risk being a victim of its own success and the EU Policy Adviser has found it hard at times to take up all the influencing opportunities available to them. These constraints are evident to HelpAge’s NGO partners who have noted the challenge of one person working alone in the Brussels office and have remarked that: “*it would be good if they had more people in Brussels too in order for them to take all the opportunities and focus on strengthening their work with the European Parliament too...*”.

The need to set realistic objectives and expectations for advocacy work at the EU was noted in a previous evaluation of HelpAge’s advocacy work (Holden 2009). This point has to be made again in this evaluation. Despite the recognition that: “*this type of work takes an awful lot of staff time.... so we need to factor that into the next proposal*” made by an HelpAge informant, it appears that, again, managing expectations –

especially in Brussels - was quite a challenge in this project. This resulted in HelpAge overly relying on staff contributions 'beyond the call of duty'. With a new EU Policy Adviser in place and a new EU advocacy strategy about to be drafted, this is a very good time for HelpAge to take stock of lessons learnt and re-evaluate its approach at the EU taking into consideration the resources at its disposal.

2.3 Effectiveness of awareness-raising activities

"They have opened our eyes and they have injected the age element in the development debate in Brussels."

"Thanks to HelpAge we learned a lot and have been more sensitive to the issue of older workers in the informal sector....."

"Old people were not discussed much in development before the [Czech] Presidency..."

Achievements

Viewing social protection through a decent work lens

This project capitalised on HelpAge International's ongoing work on social protection, albeit seen through a decent work lens. This allowed HelpAge to 'shine a light' on fundamental, but little known, issues relating to older informal sector workers in developing countries. Key messages on the experiences of older workers were effectively conveyed through reports produced as part of the project ('Working for Life', 'Forgotten Workforce', and 'Unreported Lives') as well as in the country briefs from Bangladesh, Peru and Uganda. They were also powerfully captured in the photographic material and in the individual case studies gathered in these three countries. Project materials were widely disseminated by HelpAge and its partners across four EU member states and in Bangladesh, Peru and Uganda reaching significant numbers of stakeholders thus contributing to raising awareness and inform relevant debates in these countries (section 3.3 provides external feedback on project materials).

Working through EU Presidencies

The focus on the EU Presidencies provided useful opportunities for greater participation by European partners in national CSO platforms as well as effective entry points for targeted awareness raising activities in-country. Capitalising on the opening of their new offices in Madrid in early 2010, HelpAge also managed to target the Spanish Presidency of the EU during the first half of 2010. This enabled them to forge strategic alliances with national NGOs, relevant government agencies and Spanish trade unions on occasion of the spokesperson's visit (Carlos Alarcón) in April 2010.

Conveying the voice of older workers through spokespeople

Three spokespersons' tours were organised to coincide with the work around the Presidencies in the second and third years of the project (2009-2010). Mrs. Kabango (spokesperson for Uganda) visited the Czech Republic in June 2009 during the Czech Presidency of the EU. In the same

month, Mr. Haseeb Khan (spokesperson for Bangladesh) visited Germany hosted by HelpAge Deutschland. Finally, in April 2010, Mr. Carlos Alarcón (spokesperson for Peru) visited Madrid during the Spanish Presidency.

Spokespeople were invited to represent older informal sector workers from their countries. Having all been involved in the first phase of the project including generating an evidence base on decent work for older workers, meant that they were relatively well versed in the subject area and they managed to convey national as well as individual realities of the situation of older workers in their countries. Their participation seemed to enrich and inform discussions and sparked interest from decision makers as well as the media. All three spokespeople came in contact with key political actors and decision makers during their visits. Two of the three spokespeople were interviewed by national media during their tours. All three felt that their visits had been useful in order to convey their knowledge and experiences to audiences in Europe that they wouldn't otherwise have reached. For instance, Mr. Khan forged new links with GTZ for new work in Bangladesh and Mr. Alarcón established new alliances with Spanish trade unions and local government authorities.

Overall, HelpAge is perceived by external stakeholders to be very well connected with its Southern partners as well as Southern governments, particularly in Sub-Saharan Africa. This has undoubtedly contributed to positioning HelpAge as a valued NGO actor in Brussels. One informant revealed that European Commission officials have often relied on HelpAge for *"help to identify speakers from African governments for our own events"*. Activities under this project contributed to extending that reputation beyond Brussels to HelpAge's European partners in other member states.

Areas for Reflection

Tensions between decent work and social protection

The decision by HelpAge to focus this action on the DWA as a framework for its existing work on social protection appears to have been internally contested while not being fully appreciated externally. Feedback from HelpAge informants as well as European partners shows that 'decent work' has not been successfully internalised. While some view the synergy between decent work and social protection as a *"perfect marriage"*, others consider decent work as a complete *"misfit"* within HelpAge. These people believe that decent work is neither backed by any meaningful programme work, or supported by an overall advocacy strategy, nor – fundamentally - embedded in HelpAge's mission.

European partners have also struggled with the concept of decent work and the DWA. This led, for instance, to HelpAge Deutschland dropping references to the DWA from its policy influencing activities and only making use of the evidence from the field in order to reinforce their messaging on social protection in Germany. They stated that the term 'decent work' was very difficult to translate in German and the concept

was very *“alien”* thus potentially diverting attention from their work on social protection and cash transfers. On the contrary, the concept of decent work has been embraced by Southern partners, which are possibly more accustomed to working on informal sector employment issues and ageing in their national contexts.

Fundamentally, the difference between HelpAge and its European partners, seems to be that the latter are still struggling to get basic concepts such as for instance ‘development’ in the Czech Republic or ‘ageing and development’ in Germany on their national agendas. This appears to have restricted their ability to engage fully in awareness-raising and policy influencing on more sophisticated policy areas such as decent work on top of their existing work on social protection. Some external informants also identified a potentially dangerous clash between messaging around the concept of decent work for older people and HelpAge’s calls for non-contributory universal pensions.

Interestingly, despite the focus on the DWA under this project, an overwhelming majority of external respondents still considered social protection to be the main issue that HelpAge was working on. Messaging on decent work therefore seems to have been somewhat lost in the bigger picture. With the DWA having lost momentum recently while social protection has gained in importance, HelpAge should re-assess the strategic value of continuing to focus on decent work.

Engaging with the European media

Engagement with European media was not realised as originally outlined in the project’s proposal. The media were meant to be the main vehicle for reaching out to the European public. But in the words of one informant *“we didn’t have a grasp of what EU media outlets were and didn’t make headway there”*. This was coupled with the feeling that messaging around decent work was rather *“bland”* and *“only skimmed the surface”* and hadn’t been adequately informed by a solid external scoping exercise.

This resulted in no significant media coverage in Brussels and limited coverage in the Czech Republic, in Germany and Spain mostly coinciding with the spokespersons tours. Other coverage was achieved in specialist media outlets through relevant NGOs and networks in Brussels and in the member states.

In the South, on the other hand, pick up by Southern media outlets has been more successful, particularly on occasion of the launch of the Global Report in May 2010. This also generated some media interest in the UK. Recently, HelpAge has relied on an external media consultant to help them with developing their media work in Brussels. This should be welcomed and should be seen as a pre-condition for developing any future public-facing media work on social protection at the EU level.

The UK and Slovenia as the weaker links

Although the first year was entirely dedicated to gathering evidence in partner countries in the South under ‘phase I’ of the action, awareness-raising on decent work in the UK seems to have failed to take off until

very late in the project. As put by one informant: *“we did really badly....we don't have a public face in the UK”*. In order to reach out to wider audiences in Britain, HelpAge would have had to team up with Age UK (the merger of the two UK domestic ageing agencies Help the Aged and Age Concern). However, it appears that Age UK didn't buy into decent work as, reportedly, they felt that HelpAge *“was giving out mixed messages and decent work issues didn't resonate with older people in the UK”*. The failure by Age UK to embrace the DWA thwarted public influencing and media work in the UK. This was compounded by media and public attention being diverted first to Haiti and then to the general election in the UK during the first half of 2010. Whereas HelpAge's advocacy work on social protection kept bubbling on, decision makers and key stakeholders in the UK were never consistently targeted on decent work issues other than as a vehicle for channelling messages on social protection. More recently contact has been made with trade unions in the UK with a view to forging new alliances. However, failing to actively engage in advocacy on decent work until so late in the project should prompt some re-thinking in HelpAge on the added value, and the longer-term objectives, of investing further in this area.

Slovenia has also been a rather passive associate in the project. This has openly been acknowledged in project reports. It has been put down to a combination of human resource constraints and the failure to obtain a visa for the Ugandan spokesperson to visit the country during the Slovene presidency of the EU in 2008. Participation by Slovene Philanthropy in project activities has been almost non-existent. They were not involved in the start-up workshop or in the mid-term evaluation partners' workshop and they did not attend any events during the life of the project other than the round table on decent work in Prague under the Czech Presidency. Unfortunately, they also failed to respond to interview requests as part of this evaluation, so information on activities in Slovenia remains patchy. Slovene Philanthropy's contribution to on-going and future awareness-raising actions should be re-assessed with a view to building its capacity in order to enable them to fully realise their potential within the HelpAge network.

2.4 Building constituencies of support among civil society in Europe

“HelpAge clearly makes a point of collaborating with others and building alliances to further their advocacy....others don't do that...”

Achievements

Consolidating NGO relations in Brussels

HelpAge took on a leading role within the European Working Group on Social Protection and Decent Work, which also comprises Solidar, World

Solidarity, Light of the World and the Stop AIDS Alliance. Over the past two years, the group has grown in importance and has achieved increased recognition among key stakeholders, primarily at the European Commission, in Brussels. As a group, they participated in important consultation and decision making processes such as for instance on the EU-Africa Strategy and more recently influencing the drafting of the European Report on Development, which focused on social protection. The significance of the contribution by HelpAge, primarily by the EU Policy Adviser, was clearly acknowledged by members of the group interviewed for this review. As one informant put it: *"HelpAge has always shown to be really keen to work with the group and has always invested a lot.....there is a lot that we can learn from them"*.

Building new alliances in other member states

Czech Republic

Despite being relatively new to development, Zivot 90 managed to consolidate its relationship with the national Development NGO platform (FoRS) actively participating in their 'EU presidency project' from its inception in 2008. This meant that by the time the Czech Republic took the lead of the Union during the first half of 2009, Zivot 90 was well placed to speak up on issues of ageing and development. They also established new relations with Sue Ryder International with whom they partnered on inclusive development issues. Through their work with FoRS, Zivot 90 managed to participate in debates on effective development and contributed to the consultation on the drafting of the five-year strategy of the Czech Development Agency.

Germany

HelpAge Deutschland (HAD) made contact with a number of German NGOs as well as the national NGO platform, VENRO. VENRO hosted a one-day conference on decent work in 2008, which however was fairly poorly attended. HAD believes that this was due to the fact that the concept of decent work did not resonate at all with German civil society or policy makers and the public at large. They therefore took a strategic decision to focus almost exclusively on social protection. They were invited to join the German working group on 'Social Cash Transfers' (also comprised of Brot für die Welt, Evangelischer Entwicklungsdienst, FIAN International and Medico International) in 2008, thus increasing their profile and developing strong relationships with its members. This group became the main vehicle for their advocacy work at the national level. They also joined forces with GTZ (German technical cooperation) and the German Pension Fund in order to organise a very well attended conference in Berlin in December 2009 on "Income security in old age as a global challenge". This enabled HAD to build innovative alliances with strategic actors in Germany furthering the concept of social security for older workers thus pushing the boundaries as far as possible.

UK

HelpAge conducted most of its advocacy collaboratively in the UK through the Grow Up Free From Poverty coalition. This included a number of

leading UK NGOs like for instance Save the Children, Oxfam, Plan International, Action on Disability and Development and World Vision among others. The coalition was the main vehicle for influencing the Department for International Development (DFID) and the UK government. The EU Policy Adviser also actively participated in meetings of Bond's (the UK's national development NGO platform) European Policy Group thus indirectly feeding into CONCORD's (the European development NGOs confederation) relevant position papers aimed at influencing EU policy.

Consolidating relations with the International Labour Organisation

The work on the DWA allowed HelpAge to really consolidate its existing relations with the ILO. When Rudy Delarue, one of HelpAge's key allies in the European Commission, became the Head of the ILO's Brussels office this provided them with a new launch-pad for taking their relations with the ILO to a higher level. At the same time they also strengthened their relationship with the Geneva Secretariat. They conducted complementary research to the ILO on social protection programmes thus generating useful data to support common policy work. In so doing, they forged a solid working relationship with the ILO and established their reputation as credible interlocutors. As one informant put it: *"HelpAge are recognised as leaders on social pensions....even Mr. Cichon [Head of the ILO's Social Security Department] says that"*. HelpAge's relationship with the ILO is externally perceived to be so cosy that another interviewee went as far as alleging that *"the fact that the ILO has taken older people into account in their social protection floor initiative is without a doubt down to HelpAge..."*.

Areas for reflection

Building relations with the labour movement in Europe and beyond

This review has found that, despite consolidating its relationship with the ILO, relations with the labour movement in Europe were not developed until very late in the project and are mostly still at an 'exploratory' stage. Despite attempts at reaching out to the labour movement in Europe and internationally, most HelpAge respondents acknowledged that relations had been *"patchy"* at best and much more needed to be done in order to consolidate relations with trade unions. Others, who were less convinced about the added value of continuing to focus on decent work, doubted that this was the way forward for HelpAge. A decision on whether or not to invest more resources in establishing strategic partnerships with the labour movement both in Europe and in the South should be informed by a broader reflection on the way forward in HelpAge's livelihoods work, which is intrinsically tied to the decent work concept.

2.5 Achieving change in policy and practice

"The European Commission is intensifying work on social protection....this must be a sign that it has moved up the agenda."

"HelpAge has played a key role in putting social protection on the agenda."

"There haven't been any major policy shifts on social protection since 2007.....decent work is now far less prominent..."

Achievements

Keeping social protection on the EU's agenda

It is evident from feedback provided by external stakeholders in Brussels that HelpAge is perceived to have played a significant part in keeping social protection on the EU agenda following the Council conclusions of December 2007 that called for an EU policy on social protection to be developed within the DWA. It is also widely recognised that the global economic slowdown was a major factor propelling social protection to the top of the EU agenda in 2009.

HelpAge primarily targeted the European Commission as well as the Council through its strategic advocacy with permanent representations of upcoming EU presidencies (e.g. Slovenia, the Czech Republic and Spain). This allowed them to support the work of their European partners at the national level. For instance, meetings by the EU Policy Adviser with officials at the Czech permanent representation in Brussels supported Zivot 90's efforts in Prague to influence the Czech presidency to include ageing, social protection and decent work issues as part of their 'effective development' agenda. At the European Commission, they targeted DG Employment and DG Development initially. They then broadened their focus to include EuropeAid within the framework of the implementation of the EU-Africa strategy and specifically the partnership on Migration, Mobility and Employment.

Through their collaborative work with the EU Working Group on Social Protection and Decent Work they managed to influence EuropeAid to include social protection in their aid programming at the national and regional level as well as including it in calls for proposals open to civil society organisations. But it was thanks to the quality of their advocacy with key officials at the Commission, as well as their research, their connections with Southern actors and their knowledge of social protection schemes in Africa, that they were granted 'expert status' in Brussels. This opened the door for HelpAge to expert groups and technical meetings on social protection in Brussels where they were often the only civil society organisation represented.

That Helpage is highly regarded by its key allies at the Commission is obvious. As one informant very eloquently put it: *"A year ago I was on my*

own working on social protection, but since then 90% of the arguments that I have used to convince my managers of the importance of developing an EU policy on social protection have come from HelpAge". This remark refers to the development, in 2010, of an internal position paper in DG Development making the case for an overarching EU policy on social protection as called for by the Council in 2007.

The decision by the Commission to focus its European Report on Development (ERD) 2010, the second of its kind, on social protection in Sub-Saharan Africa also contributed to keeping social protection on the agenda. Although this cannot solely be attributed to HelpAge, it is widely acknowledged by their NGO partners and EC officials alike that they played an important part in informing the debate that possibly led to this decision. HelpAge forged strong links with the unit in DG Development tasked with co-ordinating the drafting of the ERD (contracted out to the European University Institute, based in Florence, Italy) and worked with the EU Working Group in Brussels as well as with the Grow Up Free From Poverty coalition and DFID in the UK from early 2010 (as the UK was one of five EU member states financially contributing to the ERD) in order to influence the content of the report. This led to a remarkable success as many of the issues raised by HelpAge and its allies, such as the importance of the EU signing up to the UN Social Protection Floor Initiative, were included in the final draft of ERD presented in Brussels in November 2010. The ERD also echoes HelpAge's position in drawing attention to the fragmented nature of the EU's approach to social protection and calling for an overarching EU policy on this issue.

Advances at the national level in EU member states

Czech Republic

In the Czech Republic, Zivot 90 participated actively, as an associate member of FoRS, to consultations on the development of the Czech Development Strategy for 2011-2015. They *"inputted heavily"* to the Czech Presidency programme contributing to debates on inclusive development and development effectiveness. Zivot 90 also operated at the European level through AGE Platform Europe and made exploratory contact with a Czech member of the European Parliament belonging to the Intergroup on Ageing and International Solidarity. It should be noted that although they ambitiously took on social protection and decent work issues in their national advocacy work as part of this project, most of their energy was spent merely trying to draw stakeholders' attention to ageing and development.

Capitalising on their well-established reputation as the largest Czech organisation focusing on ageing domestically, they took on the newly created Czech Development Agency (CDA) to great avail. As a *"lone voice"* on ageing and development, their contribution was warmly welcomed by CDA officials as it was felt that *"older people and decent work issues were missing"*. Zivot 90 was successful in raising awareness of these issues and in contributing to the recognition of the 'social sector', including older people among others, as a priority for Czech development

policy. Although this has been described as a *“significant development”* by a CDA informant, other civil society representatives feel that the CDA has fallen short of taking on board sectoral issues and that, for instance, ageing is not explicitly referred to in their development policy.

As the emphasis now shifts to the implementation of this policy, Zivot 90 appears to be very well positioned for continuing to advocate on social protection for older informal sector workers. For instance, as an active member of FoRs’ newly created ‘policy team’ and as a trusted interlocutor of the Czech government on development issues, they were recently invited to a high level meeting in Prague with EU Commissioner for Development Andris Piebalgs. They are also keen to develop their links with members of the European Parliament further. The main concern is that all this work rests on the shoulders of a single staff member (Oldrich Stanek) who has been spearheading Zivot 90’s work in social protection and decent work but is soon due to retire. Language barriers also pose a significant constraint within Zivot 90 for greater engagement within HelpAge’s International Network. This warrants a serious reflection on the strategic importance of the Czech Republic as an influential new EU member state and of Zivot 90 as a dynamic member of the HelpAge network thus calling for additional support and organisational capacity building.

Germany

Through their high-level advocacy, HelpAge Deutschland made an important contribution by securing references to human rights, social cash transfers and older people in the former German government’s social security concept. This was published in July 2009 and constituted an important reference document outlining the government’s position on these issues. HAD and HelpAge are perceived as important actors on social protection in Germany as they have had the longest involvement in this area and they are seen to be *“well connected and doing good lobbying”*. Since 2008, bilaterally, and as members of the Working Group on ‘Social Cash Transfers’, HAD developed strong relations with key officials in GTZ (German technical cooperation agency), in BMZ (the German Development Ministry) as well with the former German Development Minister (Heidemarie Wiekzorec-Zeul) and with influential German parliamentarians championing social protection. This contributed to consolidating their ‘expert status’ opening the door to decision-making processes in Germany.

Following the change of government in October 2009, however, HelpAge Deutschland’s hard-won gains are potentially in jeopardy. According to some *“social protection has been completely neglected by the new government and there is not much hope that this will change”*. Others have a more positive reading of the current situation asserting that *“we always knew that it wouldn’t be easy”* and that the change of government is *“only a temporary setback within an already difficult political environment”*.

Although the ‘old’ social security concept still stands, the new government does not consider this to be a priority as they are focusing on economic

growth and value for money. HAD has reached out to the liberals in an effort to build bridges with new political actors. Besides getting the new Development Minister to agree to organise a round table on social protection in 2011, however, it is still unclear what repercussions the change of government will have on policy and practice on social protection issues in the longer-term.

UK

In 2009, HelpAge targeted DFID bilaterally and collaboratively through Bond and the Grow Up Free From Poverty coalition in order to influence their white paper 'Eliminating World Poverty: Building our Common Future'. In the white paper DFID pledged to "*help build social protection systems to get help to 50 million people in over 20 countries*" from 2009 to 2012. This was a remarkable commitment. On decent work, DFID re-affirmed their support for the ILO's work on labour standards and "*the provision of decent work for all*". However, no mention was made of social security measures aimed at older informal sector workers. Behind the scenes, the UK has been, until recently, a staunch supporter of the EU developing a policy on social protection. They have also embraced the 'social protection package' championed by the ILO in their Social Protection Floor Initiative and advocated for by HelpAge and its allies in the UK. Unfortunately, the UK's position on social protection, as outlined in the 2009 DFID white paper, is currently under review by the new coalition government. This could potentially jeopardise recent gains in this area as the new UK government is also mostly preoccupied with issues of 'inclusive growth' and value for money.

Areas for reflection

Falling short of achieving *lasting* change in policy and practice

Despite remarkable achievements by HelpAge and its European partners in putting ageing, social protection and, to a lesser extent, decent work issues on the agenda both in Brussels and in three EU member states, they have ultimately fallen short of achieving *lasting* change in policy and practice.

Other than securing a focus, albeit not explicit, on older people within current Czech Development Policy up to 2015, other significant policy achievements on social protection in the other EU member states could turn out to be rather short-lived. Unfortunately, favourable policies on social protection in the UK and Germany are now potentially under threat following changes of government in both countries over the past year. The new governments in both countries are currently focusing on economic growth and are prioritising interventions with strong 'value for money'.

At the EU, it is still unclear whether HelpAge's mammoth efforts to keep social protection on the agenda, also on the back of the momentum generated by the economic crisis, will ultimately pay off. Despite securing significant support for an EU policy on social protection among lower-ranking European Commission officials, senior managers, including

Commissioner Piebalgs himself, are still to be convinced this is a priority. Testimony to this has been the exclusion of any mention of a forthcoming communication on social protection from the Commission's action plan for 2011. Whether the publication of the European Report on Development in December 2010 will change that or not depends on whether senior decision-makers can be persuaded that social protection should be prioritised.

Mobilising higher level political support in Brussels

The recent impasse on social protection in Brussels clearly shows that although HelpAge has excelled at building lasting relationships with *technical* staff at the European Commission, they have lost sight of the importance of leveraging *political* support for their issues. This has been confirmed by a number of external and internal informants who have clearly identified the need for HelpAge to focus more on senior targets at the Commission as well as developing stronger relations with the European Parliament. This will necessarily require a higher investment of resources in the Brussels office as well as greater involvement by HelpAge senior managers as part of a new strategic influencing approach at the EU level.

Re-formulating the concept of social protection for new political audiences

In light of recent changes of government both in the UK and in Germany, HelpAge and HAD are now faced with 're-packaging' social protection concepts for more centre-right and liberal political audiences. This will require a change in their approach to social protection issues and language to include a greater emphasis on economic arguments and proving the value for money of social protection interventions and cash transfer schemes. This is also a good time for reviewing HelpAge's engagement on decent work and the political traction that this may have, along with social protection, within the new political landscape in these countries.

2.6 Conclusions and Recommendations

The main achievements with regard to achieving change on social protection and decent work were:

- HelpAge has managed to position itself as a leader on social protection in Brussels forging strong alliances with civil society actors and achieving 'expert status' vis-à-vis the European Commission – all this with very limited human and financial resources in Brussels.
- The focus on the EU Presidencies provided useful opportunities for greater participation by European partners in national CSO platforms as well as effective entry points for targeted awareness raising activities in-country.
- Using spokespeople from the South enabled HelpAge and its European partners to effectively convey the voice of informal sector

workers in developing countries informing debates on decent work and social protection in Europe.

- Through this project HelpAge and its European partners managed to consolidate relations with NGO allies and relevant CSO networks in Brussels and at the national level in the Czech Republic, in Germany and in the UK.
- Relations with the International Labour Organisation were also strengthened as a result of this action's focus on the Decent Work Agenda.
- Overall, HelpAge and its European partners were very successful in keeping social protection on the European agenda, in collaboration with key NGO allies and also on the back of the momentum generated as a result of the recent global economic downturn.
- Generally, HelpAge and its partners were also successful in achieving some important change in policy and practice at the national level. Whether this change will be lasting or not other than in the Czech Republic though is still to be determined.

The following areas were highlighted as needing further reflection by HelpAge and its partners:

- Given existing human and financial resource constraints, HelpAge and its European partners should set realistic expectations for awareness-raising actions and influencing work in Europe.
- The focus on decent work since 2008 seems to have failed to make a lasting impression on decision makers in Brussels and has not been successfully internalised by HelpAge and its partners on the ground.
- Engagement with European media was not realised as originally outlined in the project's proposal and needs to be reviewed in view of future public-facing work on social protection and decent work.
- The UK and Slovenia turned out to be the 'weaker links' in the partnership for different reasons.
- Despite consolidating relations with the ILO, HelpAge and its European partners have not gone far enough in forging strategic alliances with the labour movement either in Brussels or at the member states' level.

Recommendations

1. HelpAge should take stock of lessons learnt from this action and re-evaluate its expectations at the EU level taking into consideration the resources at its disposal in the Brussels office.
2. Set realistic expectations for future awareness-raising work at the EU and in EU member states.
3. With the DWA having lost momentum recently, HelpAge should re-assess the strategic value of continuing to focus on the Decent Work Agenda at EU and member states level.
4. HelpAge should review its media engagement on social protection and decent work in the UK.
5. HelpAge should rely on external technical assistance for building its knowledge on European media and developing a strategy outlining strategic engagement in this area.
6. Future awareness-raising actions of this ambition and magnitude should be supported by an overarching advocacy and communications strategy including a media component.
7. The role of HelpAge's European partners within awareness-raising and advocacy work in Europe should be re-assessed with a view to actively building their advocacy capacity for future engagement.
8. A decision on whether or not to invest more resources in establishing strategic partnerships with the labour movement both in Europe and in the South should be informed by a broader reflection on the way forward in HelpAge's livelihoods work, which is intrinsically tied to the decent work concept.
9. HelpAge should mobilise higher level political support for social protection and other ageing related issues at the European Commission. This should comprise higher senior involvement from HelpAge Headquarters.
10. HelpAge and its European partners should develop stronger relations with the European Parliament targeting MEPs from focus countries in Europe as well as in Brussels.

3. Project Implementation and Co-ordination

This section of the report focuses on issues relating to project implementation and co-ordination including: (a) the initial collection of evidence involving Southern partners, (b) assessing ways of working and (c) providing feedback on materials and tools developed as part of the project.

3.1 Building an Evidence Base

"The evidence wasn't there to begin with....we did a good job of drilling down in the three study countries."

"The evidence we pulled together was as good as it gets, it was state of the art..."

"[when writing the Global Report] we were still looking for evidence to back up our arguments rather than the other way round..."

Achievements

Boldly going where no one else had gone before

Most of the first year of the project was spent collecting evidence about the situation and experiences of older informal sector workers in Bangladesh, Peru and Uganda. This was a previously unexplored area and little or no evidence and quantitative data existed on this issue. As one interviewee said: *"our evidence helped recognise decent work issues as a true situation."*

HelpAge set out to 'bust' commonly held 'myths' about older people and work including that ageing is only an issue for high-income countries, that older people don't work, that they receive pensions in old age and that older people living in poor countries are traditionally supported by their families. HelpAge called for governments and donors to introduce programmes and measures including, for instance, the introduction of non-contributory pensions, free healthcare or better access to microfinance for older people in order to tackle the discrimination and marginalisation of older workers.

Southern partners played a key role in leading the evidence gathering exercise at the national level with a view to compiling national briefing papers. The EU Policy Adviser (Kamala Truelove) was personally involved in collecting evidence and drafting the national brief for Bangladesh. HelpAge's Programme Officer (Alice Livingstone) participated in the collection of evidence in-country and drafted the national brief for Uganda. IPEMIN lead the collection of evidence at the national level in Peru and the production of the national brief. All the evidence, including the individual case studies, was collected in a participatory way involving direct consultation with local older people's groups through focus group

discussions. This was captured in the national briefs and then aggregated in the Global Report in 2010.

Areas for reflection

Translating evidence into policy messages or tailoring messaging to the evidence at hand?

There is a shared feeling within HelpAge that most of the evidence collected was qualitative and *“patchy in some areas”* and that there was a lack of quantitative and comparative data. The overall lack of hard evidence demonstrated the marginalisation of these issues in the public arena. However, in the words of one HelpAge staff member: *“it was difficult to take a leap from three individual countries to global trends...there was a dearth of evidence”*. HelpAge had to be fairly creative about what evidence they wanted to include. Ultimately, some felt that not all policy asks were backed by hard evidence. They believed that HelpAge *“didn’t have anything strong in the end...it wasn’t hard hitting enough”*. Others instead thought that although the evidence base was not bad, this resulted in *“mixed messages”* on decent work for older people and the need for social protection.

Furthermore, despite playing a crucial role in gathering evidence in-country, Southern members were not involved in designing the research methodology or in drafting questions for the focus group discussions. Similarly, European partners were not actively engaged in this first phase of the project although they were expected to integrate resulting messages and asks on decent work within their national contexts later in the project.

3.2 Ways of working

“The workshop in London helped to bring us all on the same page and understand what we wanted to achieve together.”

“Having Southern partners from the outset added massively in terms of voices and experience...I would do it all over again.”

“The project was well co-ordinated but there was no ownership of decent work across the organisation....”

“We had problems with whose project it was...who owned it and who co-ordinated it.”

Achievements

Including Southern partners and voices

This was the first HelpAge project of its kind that included Southern partners from the outset, directly involving them in the collection of evidence in the South with a view to informing advocacy and media work in Europe. In the predecessor project to this, Southern partners had been

consulted on the choice of themes and they had contributed to informing messaging in Europe as well as participating in spokespersons' tours. However, they had not played a part in the collection of an evidence base.

All partners were brought together in London for a four-day meeting at the start of the project in order to *"thrash out"* all the issues and ensure that all partners understood how they would contribute to project implementation. It was clear that Southern partners would play a significant role, with support from HelpAge, in phase one of the project while European partners took a backseat while initially *"warming up"* stakeholders and building alliances with civil society actors at the national level in view of an advocacy push in phase two of the project. This appeared to work seamlessly on social protection issues given their history of engagement in this area of work. However, *"warming up"* stakeholders on decent work proved more of a challenge until the country briefs and the EU policy brief (Working for Life) were finalised in 2009.

Most of the first year of the project was dedicated to gathering evidence in Bangladesh, Uganda and Peru, putting Southern partners in the driving seat and playing to their strengths. Overall, older informal sector workers were consulted in an inclusive and participatory way and individual case studies were also collected in the process. Time and resources invested in this initial phase contributed to consolidating HelpAge's credibility on social protection as well as building a new external profile on decent work. This gave an impression externally that HelpAge's work on the DWA was firmly rooted in their work on the ground. As one informant said: *"as NGOs we often get asked to consult Southern partners and channel their voices....HelpAge does this very well"*. As previously mentioned, the DWA struck a definite chord with Southern partners who were far more exposed than their European counterparts to the reality of poor and marginalised older people working in the informal economy in their own countries. Evidence gathered as part of the project thus informed advocacy work on decent work and social security for older informal sector workers at the national level in all three partner countries in the South.

Areas for reflection

Underlying co-ordination and ownership issues

Project co-ordination and implementation were generally satisfactory. Most activities were implemented to plan and generally on time. Most delays or omissions were adequately explained in project reports. It should however be noted that, to date, planned public events in the UK and in Brussels have not yet taken place.

The project was to be remotely co-ordinated by the former EU Policy Adviser (Kamala Truelove) who was based in Brussels and was new to the organisation. This was not an ideal arrangement and it led to initial 'teething problems' in the co-ordination of the project. According to one informant: *"the project management structure was just terrible....Kamala was project manager but she was new and people were constantly undermining her"*. Others mentioned an underlying *"tension"* between

policy and communications teams fostering uncertainty about whose project it was and who co-ordinated it. HelpAge has undergone a significant re-structuring process in London during the life of the project. This has resulted in a new organisational structure in policy and communications and a greater emphasis on public facing and campaigning work. Roles and responsibilities have not yet been entirely clarified and there is a potential danger of further duplication between the newly created Advocacy and Communications department and the Policy, Influencing and Learning Team (now part of the newly named 'Programmes and Policy Department'). This will need to be resolved in order to avoid a repetition of the issues already identified by this review.

European and Southern partners provided very positive feedback on the project's co-ordination structure and the quality of support they have received throughout the project. Nevertheless, there appear to have been some weaknesses in the communication flows between HelpAge, European and Southern partners, particularly with regards to media work resulting in weak co-ordination and collaboration between the different partners in this area. Given the recent re-structuring of the policy and communications teams, HelpAge should ensure that the division of labour between the two teams is clarified and taken into account when developing new projects.

The fact that there was no overall "*master plan*", in other words an advocacy and communications strategy, to bring it all together other than what was outlined in the project proposal and logical framework, was identified by some informants as an inherent weakness of this project. Others felt that the project failed to get sufficient buy-in from HelpAge country offices as "*it was disconnected from our work on the ground*", especially the decent work component. Admittedly, the action did not aim to get broad buy-in from HelpAge's global partners. However, this meant that there was little uptake of the project's publications and messaging, as well as hardly any media engagement, particularly on decent work, across the HelpAge network beyond the study countries.

Questioning the value added of spokespersons' tours

The value added by spokespersons' tours towards awareness-raising in Europe was openly questioned by European partners at the internal mid-term evaluation meeting in Germany in October 2009. Using spokespeople to convey the voices of older people in Southern countries has been used by HelpAge and its partners as an awareness-raising and advocacy tool since 2006. This project provided the first vehicle for Southern partners and spokespeople from the South to participate in a structured and strategic way from the start. European partners took the lead in setting up and implementing one spokesperson's tour to their country during the life of the project.

Generally, however, it was felt that the significant investment required in time and resources to organise the tours (over a period of ten days to two weeks) was ultimately not matched by the political 'mileage' and media coverage they got out of the visits. This needs to be considered within the

context of serious human resource constraints characterising HelpAge's European partners. On the contrary, the spokespersons found the tours very rewarding, if a little exacting, and appreciated the exposure to new audiences and decision-makers. However, two of them also felt that they hadn't had a chance to feed back their experiences and properly de-brief on the project for some time. Mrs. Kabango, for instance, floated the idea of some final meeting between all partners to this end. Rather than evaluating the value of spokespeople tours prematurely, HelpAge should facilitate a closing project workshop to consult all members on their experiences and lessons learnt. This should inform the development of any new awareness-raising actions in Europe. It could also potentially inform more focused capacity building activities and preparation for any future spokespersons.

3.3 Materials and outreach

"Their reports are good and credible, I always pass them on to my colleagues..."

"I have shared their materials with our communications people as examples of high quality publications..."

"Their publications are very good: modern concise and clearly written with beautiful photographs."

Achievements

Setting the standard

External feedback on HelpAge publications was excellent all round. Publications were described as: *"professional"*, *"modern"*, *"useful"*, *"concise"*, *"very high quality"*, *"credible"* and *"clearly written"*. HelpAge's newsletter, 'Ageing and Development', was often quoted as a useful resource by external informants alongside thematic reports and briefs drafted under the project. Briefings produced by the EU Working Group on Social Protection and Decent Work, particularly to inform the debate on the recent European Report on Development, were also considered to be very useful.

NGO allies were also extremely appreciative of HelpAge's publications and commented on the usefulness of integrating individual case studies in order to illustrate the points made in the briefings. However, web-based resources and the photographic exhibition produced under the project were less known to external stakeholders, particularly in Brussels.

Within HelpAge, the portfolio of reports and briefs linking social protection to decent work was considered to be *"invaluable"* as *"it was the first time that we had all the information on decent work in one place, so it was very good for our advocacy"*. It was felt that developing the materials contributed to establishing HelpAge's external profile on decent work thus fuelling their advocacy on this issue.

HelpAge and its European partners also developed web-based materials and interactive resources on decent work with funding from this project. These were all developed during year two (2009) of the project. HelpAge's re-branding exercise the same year, however, meant that HelpAge's and HelpAge Deutschland's websites had to be changed in 2010. HAD launched their revamped micro-site in mid 2010. HelpAge instead launched the decent work section of their new website in September 2010. The 'myth busting' idea, which characterised the 'Unreported Lives' media brief, has been transposed online by HelpAge in the form of a 'Decent Work Quiz'. This had received almost 170 hits by mid November 2010. The websites provide public access to all the materials developed as part of the project as well as links to the 'Flickr' website for viewing the photographic exhibition. Three months since the launch, about 200 people had viewed the social protection and decent work pages on the HelpAge website.

Old people's blogs and videos have been singled out by respondents as the most innovative aspect of HelpAge's new web-based resources. Video blogging was successfully trialled by Mrs. Kabango during her visit to the Czech Republic in 2009. It has now been taken up more widely by HelpAge as an empowering tool for older people. In light of this, HelpAge should continue to develop digital communication tools and the use of interactive video and blogs in its advocacy and campaigning in Europe. This however will need to be guided by the development of a digital marketing plan to accompany advocacy, communications and media strategies.

Areas for reflection

"Too many fingers in the pie"?

The Global Report was launched in May 2010. Described as *"a first"*, the report elaborated on the evidence gathered in the country briefs aiming to give an overall picture and an analysis of older people working in the informal sector economy in the South. As previously discussed, there was very little existing evidence in this area and HelpAge's contribution, despite providing very useful qualitative data, lacked somewhat on the quantitative and comparative side. This meant that HelpAge *"struggled a little to come up with messages"* and in translating the evidence into policy asks.

Overall, the drafting of the Global Report involved a lot more work and HelpAge staff spent far more time on it than originally anticipated. Three authors were deliberately 'put on the case' due to limited capacity and resources across the board. However, this 'drafting by committee' approach meant that: *"too many fingers in the pie made the report too fluffy rather than hard edged"*. This was confirmed by most of the authors of the report who found the 'committee' approach *"without real leadership or steer"* to have been *"not very straightforward"*, rather *"time-consuming"*, *"confusing"* and generally *"not very effective"*. Although some believe that this iterative process resulted in a much improved

report, it is felt that stronger leadership and management would have greatly improved the process.

Reaching out to the public

There appears to have been some confusion over how the Global Report and the accompanying media briefing (with a different title) were to be disseminated and used internally and externally. Although an external journalist had been brought in to draft the media brief, some internal informants felt that *"it still looked like an NGO document as it wasn't new and 'shocking' enough"*. This resulted in some media coverage mainly in the South but not to the level that was outlined in the project proposal. Some European partners also felt that the Global Report and the media brief have come too late in the project failing to support their advocacy and public awareness work at the national level. They also feel that these materials have not been that accessible to the wider public in their countries as they were in English. There is no record of how the Global Report has been utilised by Southern partners as they have focused mainly on using their country briefs.

The idea behind developing the photographic exhibition was to attract mainstream media and the wider public. This was successfully mounted in Prague during the Czech Presidency of the EU attracting over 2500 visitors over one month. Uptake in Germany has been far slower and is only now beginning to pick up. To date, the exhibition has not been shown in the UK or in Brussels. 'Viewings' of the Decent Work Gallery on 'Flickr' have also been unremarkable. From February 2009 - when the photographs were uploaded - to March 2010 the Gallery (comprising 27 photographs) was viewed a total of 835 times. This figure, however, includes both HelpAge staff downloads, or 'viewings', as well as ones from the general public. Getting an internationally known photographer to take the photographs for the exhibition (Antonio Olmos) does not yet appear to have yielded the expected results in terms of media attention or public exposure.

The ambitious vision of using HelpAge and HelpAge Deutschland's websites as 'key portals' for mass public campaigning in Europe and the South has not been fully realised yet either. The idea for an online petition on decent work to reach out to new supporters and activists across Europe was dropped early in the project. The official justification for this was to avoid duplicating Solidar's e-campaigning efforts as part of their decent work campaign. Unofficially, however, some internal informants feel that the e-petition was abandoned *"as we understood that it was beyond our reach"....* As HelpAge invests more in developing its digital communications and pushes its boundaries further, they should review the role of e-campaigning tools in their future advocacy work.

3.4 Conclusions and Recommendations

The main achievements with regard to project implementation and co-ordination were:

- Building a new body of evidence to show the magnitude of the problem and the issues affecting older people working in the informal sector in poor countries in the South..
- Including Southern partners from the outset giving them a lead role in the collection of evidence in the study countries.
- Producing high quality publications and materials setting the standard in the NGO sector and leading by example.

The following areas were highlighted as needing further reflection by HelpAge and its partners:

- The soundness and credibility of translating patchy evidence in certain areas, particularly on decent work issues, into policy messages and asks.
- Despite the generally good implementation of the project, some underlying issues concerning co-ordination and ownership were identified.
- The added value of spokespersons' tours to Europe was questioned by some.
- The need to re-think the production of major overarching publications on the back of the experience in drafting the 'Global Report' for this project.
- Missed opportunities for reaching out to wider public audiences directly, through digital media and web-based communications, the photo exhibition and through the media in Europe.

Recommendations

1. In light of the recent re-structuring of the policy and communications departments, HelpAge should ensure that the division of labour between the two teams is clarified and taken into account when developing new projects.
2. Organise an end of project evaluation workshop involving all partners in order to assess achievements, look at ways of working and lessons learnt. This should inform any future proposals for similar actions.
3. The development of digital communication tools and the use of interactive video and blogs for advocacy and campaigning in Europe by HelpAge should be guided by an overarching digital marketing plan supplementing advocacy and communications strategies.
4. As HelpAge invests more in its digital communications they should review the role of e-campaigning tools in their future advocacy work.

4. The Way Forward

As part of this review, external stakeholders in Brussels and other EU member states were asked for their views on upcoming debates and opportunities in the year ahead for HelpAge and its partners to advance their advocacy work on social protection and decent work in Europe. A potential 'roadmap' for where to go next on social protection and decent work is outlined in this section.

4.1 Where next in Brussels

A number of upcoming opportunities and potential entry points for advocacy by HelpAge and their European partners were identified by informants.

- As the **European Report on Development** will set the agenda on social protection, it was felt that HelpAge and the EU Working Group on Social Protection and Decent Work should follow all developments closely and build on the momentum created by the launch of the report in December 2010.
- HelpAge and the EU Working Group should contribute to the current public consultation on the future of EU development policy coinciding with the launch of the **EC Green Paper on 'EU development policy in support of inclusive growth and sustainable development – Increasing the impact of EU development policy'** in November 2010. As the emphasis is now on growth, influencing on social protection should intensify in order to ensure that this will not detract from social and human development aspects.
- HelpAge and its European partners should get involved in the debate on the next **Multi-annual Financial Framework** (a.k.a. financial perspectives) as soon as possible through their work with national NGO platforms and CONCORD.
- HelpAge should capitalise on the merger between **DG Development and EuropeAid**, which is expected to strengthen synergies on social protection between the two departments. In order to do so they should heed calls for higher-level engagement to mobilise political support for social protection from senior managers at the European Commission.
- Relations with **DG Employment** should be strengthened in order to advance advocacy on decent work.
- Greater engagement with members of the **European Parliament** will be fundamental in order to secure adequate resources for social protection in the new institutional architecture.
- Endorsement by the EU for the **UN Social Protection Floor Initiative** will have to be secured through sustained lobbying at the European Commission and the European Parliament.
- The transition process and the establishment of the **European External Action Service** will need to be closely monitored.
- The current consultation on **Budget Support** should also be monitored by HelpAge.

- HelpAge should continue to engage on the **EU-Africa Strategy** and the **ACPs**, particularly following the 3rd EU-Africa Summit where the new Action Plan for 2010-2013 was adopted.

4.2 Where next in the EU Member States

Czech Republic

- Zivot 90 should deepen its engagement with FoRS' policy team in order to monitor the implementation of the **Czech Development Strategy 2011-2015** and the development of country strategy papers.
- Zivot 90 should play an important role in 2011 during the **Hungarian and Polish presidencies of the EU** as they have good contacts in these countries.
- Zivot 90 should be supported in its efforts to build stronger relationships with relevant **Czech members of the European Parliament** .

Germany

- HAD will have to continue the awareness raising work on social protection and 'older people protection' within civil society in collaboration with members of the Social Cash Transfers Working Group.
- Engagement with 'new' members of the German Bundestag will need to be continued in order to secure fresh support for social protection and social pensions.
- HAD should respond to political changes in Germany and by **adapting their concept of social pensions and social protection**. This will imply greater emphasis on the economic aspects and the 'value for money' of social pensions.
- Relations with the new **Minister for Development** will need to be nurtured.
- Structures and mechanisms for **on-going dialogue** between the government and civil society on social protection should be consolidated in 2011.

UK

- HelpAge should continue to work with the Grow Up Free From Poverty coalition in order to raise awareness of, and re-frame, social protection vis-à-vis the **new coalition government in the UK**.
- If HelpAge wants to step up its engagement on decent work, they will need to build stronger alliances with the **trade union movement** in the UK.
- Shortcomings in **public facing work** in the UK and inherent weaknesses in **media** engagement on decent work issues will need to be resolved prior to stepping up engagement with the new government.

Annex 1 List of People Interviewed

HelpAge Informants	Name	Post
	Kamala Truelove	Former EU Policy Adviser (Brussels)
	Rosaleen Cunningham	Media Co-ordinator
	Astrid Walker-Bourne	Policy Team Manager
	Celia Till	Publications Officer
	Alice Livingstone	Programmes Officer (project manager)
	Mark Gorman	Director of Strategic Development
	Jane Scobie	Communications Team Manager
	Ellen Graham	Current EU Policy Adviser (Brussels)
Partners	Kezia Mukasa	Projects Officer, Uganda Reach the Aged Association (URAA)
	Margaret Kabango	Board Member URAA - Spokes Person (Uganda)
	Carlos Alarcón Aliaga	President, Institución para la Pesca y la Minería (Peru)
	Oldrich Stanek	International Officer, Zivot90 (Czech Republic)
	Haseeb Khan	Director, Resource Integration Centre (Bangladesh)
	Michael Bunte	Executive Director, HelpAge Deutschland
External Informants	Hjordis D'Agostino Ogendo	EuropeAid, European Commission
	Tamas Varnai	DG Development, European Commission
	Barbara Caracciolo	Decent Work Project Officer, SOLIDAR
	Rudi Delarue	Director, Benelux ILO Office, Brussels
	Bart Verstraeten	World Social Movement, Social Alert, Brussels
	Nicolas Gerard	DG Development, European Commission
	Marie Zázvorková	Policy Officer for FORS (Czech Forum for Development Cooperation)
	Martin Náprstek	Deputy-director of Czech Development Agency of Ministry of Foreign Affairs
	Michala Hozáková	Editor of the magazine "Rozvojovka"
	Rolf Künnemann	Human Rights Director, FIAN International (Germany)
	Yvonne Deblon	Project Manager, Sector Initiative Social Protection, GTZ (former parliamentary assistant for Mr. Walter Reister MP)
	Frank Schneider	Junior Project Manager, Sector Initiative Social Protection, GTZ

Annex 2 List of Documents Reviewed

Relevant Project Documents

- Taking Action on and listening to the forgotten poor in European development policy (UKS108)
 - Project proposal
 - Project Evaluation
 - Final narrative report
- Decent Work for All: Promoting Older Workers Inclusion (UKS130) project proposal
 - First interim narrative report
 - Second interim narrative report
 - Report from start up workshop (May 2008)
 - Report from European partner meeting (September 2009)
- Linking Real Lives – Creating Solidarity with Older People in Developing Countries (UKS152) (project proposal)
- Towards a fairer and more inclusive MDG agenda and development paradigm: galvanizing support for poverty approaches that work (concept note)

Project Materials

- Evidence gathering planning materials
- Country reports (Bangladesh, Peru, Uganda)
- Working for Life (Policy Brief)
- Forgotten Workforce (Global Report)
- Unreported Lives (Media briefing)
- Ageing and Development issue 26 and 27
- Online resources:
 - HelpAge website decent work pages: <http://www.helpage.org/Researchandpolicy/Decentwork>
 - Online photo gallery/case studies: <http://www.helpage.org/Researchandpolicy/Decentwork/Photogallery>
 - Decent work quiz: <http://www.helpage.org/what-we-do/work/quiz-invisible-workers>