

SEVENTH FRAMEWORK PROGRAMME

ICT and Ageing



D5.1a Interim Report on Consensus Meetings

January 2009

D5.1a – Interim Report on Consensus Meetings**Edited by:** UNINOVA**Contributors:** UNINOVA: Luis M. Camarinha-Matos, Filipa Ferrada, Ana Ines Oliveira, João Rosas
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This report is an interim version of deliverable D5.1, giving an overview of the multiple activities related to the interactions with stakeholders contributing to the elaboration of the roadmap that took place during the first year of the project.

The various types of events organized by ePAL are introduced. The occurrences of each type are then described through a brief synopsis of the addressed topics and main results of each event.

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1. INTRODUCTION

This report is an interim (not planned) version of deliverable D5.1 which is due at month 24. The purpose of this version is to give an overview of the multiple activities related to the interactions with stakeholders contributing to the elaboration of the roadmap that took place during the first year of the project.

As the area covered by ePAL requires contributions from across a wide spectrum of knowledge sources, the involvement of a variety of participants from multiple scientific disciplines, policy makers, socio-economic actors, and elderly end-users, is necessary. The formal involvement of such large number of stakeholders as partners in a consortium would represent a big increase in the coordination efforts and related costs. Therefore, the approach adopted in ePAL, as stated in the DoW, is to have a small consortium, whose role is mainly to lead and coordinate the road mapping process and then involve a large number of external entities in focused activities e.g. brainstorming sessions / workshops, surveys, etc. By organizing these events in different geographical regions, it is also easier to involve a significant number of busy experts who could otherwise have difficulties in attending events in selected major cities in Europe.

The plan for involvement of / interaction with external stakeholders considers three main phases of the project:

1. *Trends and requirements identification*
2. *Consensus building and roadmap revision*
3. *Dissemination and impact creation*

The first 2 phases correspond to the roadmap elaboration, for which the focus is not on quantity of participants but rather on attracting experts, visionaries and lead users. The last phase is focused on reaching a wide dissemination of results for which a broad participation is aimed.

Therefore, the main emphasis in the first phase is to collect inputs from participants, the second phase is foreseen as a period of strong interaction in which the consortium provides suggestions and discusses with participants, getting their feedback. In the last phase, although some feedback will be still acquired for final refinements, the focus is put on dissemination and impact creation.

During the first year of the project the efforts were mainly focused on phase 1 and beginning of phase 2.

In operational terms, and in accordance with the defined approach, the following types of meetings were designed:

- **NCM** – “Normal” consortium meetings. Events attended by consortium members and devoted to the roadmap leading / coordination activities.
- **TRE** – Trends and Requirements Events. Interactions with stakeholders, with particular emphasis on end-users and experts in different topics that can complement the expertise available in the consortium.
- **CBE** – Consensus Building Events. Workshops devoted to the discussion, validation and improvement of the preliminary versions of the roadmap. These events will be organized in the next semester.
- **DAE** – Dissemination and Awareness Events. Workshops, seminars, and special sessions in conferences devoted to disseminate the results of the project.

During the first year, and according to the work program, the focus was on the elaboration of a draft roadmap (which will be finished in the first quarter of the second year) and, as such, most of the organized events were of types NCM and TRE. Next phase of the project, in addition to NCM meetings, will include a substantial number of CBE and DAE events.

2. NORMAL CONSORTIUM MEETINGS

During the first year the following consortium meetings took place:

2.1 NCM1: Kick-off meeting in Porto

Place: Porto, Portugal

Date: 28-29 February 2008

Number of attendees: 8

The theme of this meeting was focused on making a detailed discussion of the project goals and plan, in order to reach a better alignment of all participants. Furthermore the road-mapping methodology to be followed was thoroughly discussed and WP1 – Baseline consolidation and WP7 – was launched. As a consortium meeting, coordination and management issues were also discussed.

The main achievements were:

- Solidification of a common understanding of the project goals, aimed outcomes, and constraints.
- Clarification of the concept of roadmap in the ePAL context and the methodology to be followed.
- Overview of the various WPs' objectives, methodology, timing and expected results.
- Agreement on a common working framework.
- First definition of the strategy to create community building and dissemination.
- Identification of impact creation actions to be pursued.
- Preparation of D1.1 plans.

2.2 NCM2: Meeting in Seville

Place: Seville, Spain

Date: 14-15 May 2008

Number of attendees: 10

The meeting objectives were the evaluation of the status of the work done in WP1, namely the preparation of the deliverable D1.1 and consolidation of its findings; the launching of WP2 – Building the vision, and WP5 – Community building and dissemination.

The main achievements were:

- Consolidation and refined plans for further development of D1.1 regarding:
 - Survey on the current practices
 - Survey on related projects
 - Research on the state of the art of the ePAL contributing areas.
- Establishment and definition of the vision elaboration procedure and the systematic approach to build ePAL's vision, highlighting the principal steps, tasks, and inputs.
- Preliminary characterization and analysis of key drivers.
- Consolidation of scenario, vision and roadmap terms and definitions.
- First identification of probable scenario cases and methodology to construct them.
- Discussion of approaches to disseminate the project results and to create a community, including the methodology to follow, and the plans to create a database with all stakeholders' contacts.
- First categorization of stakeholders:
 - Interested in being informed
 - Interested in being involved
 - The ones that have already participated in ePAL meetings
 - The ones that potentially could participate in ePAL meetings.
- Launch of the ePAL website with the features needed for the project purposes. Agreement on the project's logo.

2.3 NCM3: Meeting in Maastricht

Place: Maastricht, The Netherlands

Date: 14-15 July 2008

Number of attendees: 9

The themes of this meeting were threefold: (A) assessment of the latest inputs and planning the final steps for D1.1, (B) progress in building the vision, and (C) refinement of strategies for community building and impact creation. As such, the Main achievements of the meeting included:

A) In relation to the results of WP1, reported in D1.1, all partners progressed on activities addressing the baseline consolidation of the ePAL environment, in particular on the following four subjects:

- Extensive survey and analysis of current practices related to Communities of Active Senior Professionals (CASPs), including: (a) scope and aim, (b) composition and governance, (c) areas of interventions and clients, (d) sustainability and operation, (e) members and membership types, (f) use of ICT, and (g) experience with external collaborations.
- Survey of other projects addressing aspects related to ePAL, namely a study of a number of related EC-funded projects was reported focusing on three elements about those projects, including: (a) the project aims and its relation to ePAL, (b) analysis of the aspects addressed by the project in relation to the needs of senior professionals, and (c) the relevance of the achieved results to ePAL project.
- Clarification of the base terminology used in the area of active ageing and silver economy.
- Synthesis of literature study to elaborate the state of the art and the new developments in research, including the following topics: collaborative networks, affective computing, soft computing, behavioral computing, and machine learning.
- Socio-Economic background of “Active Aging” in the EU, particularly the need for restructuring the economic systems in Europe to better fit the ageing population in order to make a balanced society.
- Social-security background and identification of the main needs to the project context.

B) In relation to the activities of WP2, reported in D2.1, a summary of achievements addressing the following issues is:

- Reinforcement of objectives and methodology for building the vision: this topic addressed the process and steps in building the vision for ePAL environment. Building the vision itself starts early on the roadmapping process. Guidelines for further development of the roadmap were also established. A number of systematically ordered steps must be followed to capture all aspects that need to be addressed by the vision.
- Brainstorming on the visioning related “worlds” of ePAL environment: this topic focused on characterization of actors in the ePAL environment on the basis of their roles and the split among the three “worlds”, namely: (a) World of knowledge and talent, (b) World of mediation and support, and (c) World of client and innovation (see the side picture).
- Planning the preparation of D2.1: the table of contents and some deadlines for all partners were agreed.



C) Other reported results and agreed items during the meeting included:

- Refinement of the impact creation strategy: a draft of the impact creation strategy was presented and discussed.
- Agreement on the software tools for community building, namely Extranet + MySQL, was reached.
- First instantiation of the stakeholder’s categorization was agreed.
- Some refinements of the website functionalities and content were addressed.

2.4 NCM4: Meeting in London

Place: London, United Kingdom

Date: 21-23 October 2008

Number of attendees: 10

The main purpose of this meeting was focused on the progress of the running work packages: building the vision (final considerations), gap analysis between the current baseline and the desired vision established for ePAL, and implementation models for the active aging concept and community building. The main emphasis was on the planning of the final steps for concluding D2.1.

The main achievements were:

- Establishment of a refined working terminology – elaboration of working definitions for the base concepts related to visioning.
- Reorganization of the six key drivers for the vision into three main perspectives (technological, social and organizational perspectives).
- Analysis of the proposed scenarios and consensus on the best approach to group them, through six different clusters.
- Homogenization of the format for the presentation of those scenarios.
- Clarification of the ePAL's positioning in the ICT context: it was agreed that is important to identify future innovative technologies rather than finding how the existing technologies can be used.
- First results (through consortium brainstorming) of the key drivers and trends for building the vision following the three different perspectives.
- Discussion and first findings of the different types of CASPs.
- Development of preliminary instantiation of ePAL's vision taking into consideration the different perspectives and formulation of the first vision statement.
- Establishment of two levels for the methodology of the gap analysis:
 - Macroscopic level (SWOT analysis)
 - Low level (focused on facets – strengths and limitations).
- Identification of the approach to follow in the implementation models characterization.
- Agreement on the first review meeting date (to be suggested to EC).

2.5 NCM5: Meeting in Madrid

Place: Madrid, Spain

Date: 9-11 December 2008

Number of attendees: 8

The theme of the meeting was focused on the progress of implementation models for the active aging concept; the progress of the gap analysis between the baseline and the vision; elaboration of an appropriate action plan for consensus building events and plans for dissemination, and finally on the preparation for the annual project reporting and review.

The main achievements were:

- Establishment of the final methodology for the analysis and characterization of current and emerging implementation models for the active aging concept.
- Definition of the core actors and classification of roles in ePAL.
- Classification and characterization of stakeholders and identification of their organizational forms.
- Agreement on the D4.1 content and assignment of activities.
- First results on the gap analysis mainly focused on a SWOT analysis made by all partners.
- Agreement on the D3.1 content and assignment of activities and responsibilities.
- Assignment of actions and responsibilities related to the dissemination and community building subject:

- Draft planning of the agenda of next Consensus Building Events (CBEs) and clarification of what these events should consist of.
- Decision on translating the ePAL newsletters to different languages (Portuguese, Spanish, Russian and Swahili), taking advantage of the language skills existing in the consortium, and aiming at reaching a wider audience.
- Planning of the second newsletter content.
- Clarification of concepts related with the annual report and first planning of what should be presented at the review meeting.

In addition to the formal consortium meetings, and taking advantage of other events, some additional bi-lateral meetings took place between partners attending those other events (e.g. Uninova, UvA, WLP during ICT 2008 in Lyon).

3. TRENDS AND REQUIREMENTS EVENTS

With the purpose of collecting elements for the requirements identification and also complementary information on the trends on specific research areas, the following events were organized during the first year. In order to optimize costs, most of these events were organized on the occasion of the consortium meetings described in the previous section.

3.1 TRE1: Workshop in Porto

Place: Porto, Portugal

Date: 28 February 2008

Number of attendees: 11

The principal purpose of this workshop was to first getting in touch with real associations of senior professionals and learning how these organizations work taking into consideration different perspectives: organizational, social, operational aspects, etc.

The invited associations were: SECOT, a Spanish association also partner of the ePAL project, represented by Carlos Diez, and SHARE, a Portuguese association from Porto, represented by José Milheiro and Manuel Carneiro. The workshop included presentations and an extended discussion period.

The main lessons learned were:

- Both associations have similar missions and objectives.
- SECOT's members are not allowed to receive income for the services they give. SHARE's members are.
- SECOT's members pay a membership fee. SHARE's members not (so far the association has managed to get sponsors supporting it).
- Both associations are sponsored by external bodies.
- SECOT has a large number of members (~900) and SHARE around 80.
- The services they provide are mainly in the area of consultancy.
- SHARE has a more proactive positioning, looking for new opportunities to contribute to.
- SECOT mainly reacts to external requests.
- SHARE has a strong link with universities, promoting interactions between them and local SMEs and also offers specialized lectures (namely on soft skills) for several institutions.
- Both associations face as principal barrier the lack of requests from potential customers.

3.2 TRE2: Meeting with Young Retired Network Canada

Place: London, United Kingdom

Date: March 2008

Number of attendees: 3

The meeting was held between Charles Feaver, Director of Young Retired Canada (a Canadian retirement planning association) and Jim Playfoot and Will Leonard of White Loop Ltd. The purpose of the meeting was to describe project and get a North American perspective in active aging for senior professionals.

Lessons learned:

- Charles Feaver provided a detailed analysis of the challenges around active aging in North America and explained the advances in Retirement & Career planning that have evolved over recent years. People often wish to take more risks and effect a career change in their active professional life when they reach retirement age but there is a lack of support for dynamic, entrepreneurial seniors.

- Particular discussion developed around legislation aimed at the over 50s. Mr Feaver introduced the concept of elderly vs “wellderly”. In North America & Europe the over 50s are often considered as a homogenous group and legislated to accordingly. In fact, the baby boom generation (“wellderly”) which are largely responsible for an aging society have a number of financial, social and organisational needs which are completely different to passive retirees.

3.3 TRE3: Meeting with CONFEMAC

Place: Seville, Spain

Date: 8 May 2008

Number of attendees: 4

This meeting in Seville had as main objectives presenting the ePAL project and knowing the objectives and characteristics of CONFEMAC.

MR. Eduardo Sánchez made a brief presentation about the history of the association and the main activities realized. Also they showed their infrastructures and some examples of the projects they are developing.

The main objective of CONFEMAC is to promote, organize and develop new alternatives that help elders to have an active and healthy life and to involve them in the society.

The main lessons learned were:

- Their activities are orientated to maintaining active life after the retirement; participating in solidarity programs and intergenerational programs.
- CONFEMAC is giving courses of ICT for people with different levels of knowledge. It has a Permanent Classroom of computer science.
- CONFEMAC develops its activities at a national context.
- The members are elders with different grade of knowledge and experience.
- The members of the association do not perceive any remuneration.

3.4 TRE4: Meeting with SEN@ER

Place: Seville, Spain

Date: 12 May 2008

Number of attendees: 3

During the meeting in Seville, Josefina Jimenez presented the main objectives and characteristics of sen@er, initiative of European regions.

Sen@er is a reflection and investigation forum about potential effects of ageing population in the region's development.

The main lessons learned were:

- sen@er is a silver economy network of European regions.
- Nowadays there are included 11 European regions.
- All the members signed the Bonn declaration for the Silver economy and act according its principles.
- The main objective of the network is to improve the quality of life for older citizens, stimulate economic activity for growth and job creation, and support cohesion and inclusion across European Union regions.
- The regions members carry out their own investigations and projects jointly through meetings, conferences and common woks.
- Sen@er is divided in several special interest groups (calls SIG's), always around elderly: tourism, home services, culture, health and welfare, financing services, networks.

3.5 TRE5: Workshop in Seville

Place: Seville, Spain

Date: 14 May 2008

Number of attendees: 13

The aim of this workshop was to learn from other active ageing practices. Taking this into consideration, in addition to SECOT, two other Spanish organizations were invited to the event; the CONFEMAC, which is a Confederation of Active Senior's Associations, represented by its President Mr. Eduardo Sánchez, and the FUNDACION RED ANDALUCIA EMPRENDE through the "Seniors" program, which is an initiative promoted by a public body denominated *Consejería de Innovación, Ciencia y Empresa*, represented by Rafael González Martos.

Mr. Sánchez made an enthusiastic presentation starting with his view of active aging and sharing with the audience the social and economic problems that Spain is facing when it comes to the participation of the elderly in the society. In a second phase he presented the main objectives of CONFEMAC as well as their current activities and finished stating that he sees himself as a "grey panther" because he raises his voice to society in order to get a better life for old people.

Mr. Martos first revealed the program objectives which are seen as complementary: (i) to give senior professionals, whether jubilees or not jubilees with a great professional trajectory, the opportunity to share their knowledge, competences and contacts, in order to support young entrepreneurs of Andalucía, and (ii) to provide the critical sectors of Andalucía with projects from young companies. Their definition of "senior" and the operational mechanisms that rule this program were also presented.

The main lessons learned were:

- CONFEMAC believes that it is extremely important to create awareness on decision and policy makers for the active aging concept.
- CONFEMAC affirms that the elderly feel marginalized in society.
- In CONFEMAC they give special attention to the ICT training. They have a learning programme that consists of virtual classes all over Spain, being the main target people living in rural places.
- Through the "Senior" programme (an initiative promoted by the Spanish government), senior professionals and young entrepreneurs get together in order to exchange knowledge and get support. This model is extremely interesting to ePAL once it uses an intermediary, the FUNDACION RED ANDALUCIA EMPRENDE, to put both worlds in touch.
- Although some consultancy jobs would require a variety of expertise, it is still not a common practice to involve teams of seniors. Most projects are performed by single persons.

3.6 TRE6: Meeting with APCS in Lisbon

Place: Lisbon, Portugal

Date: 07 July 2008

Number of attendees: 5

This meeting in Lisbon had as principal objective the sharing of knowledge and experiences of one Portuguese association of professional seniors.

It started with a brief description of the ePAL objectives, by the project coordinator, followed by a presentation of APCS (Portuguese Association of Senior Consultants) objectives and current operating practices represented by Mr. José Dias Correia.

APCS main aim is giving its associates a place where they can work with pleasure and independency, with judgment immunity. It is a non-profit association and it opens membership to people 40+ with professional skills. So far they count with 90 members.

The main lessons learned were:

- APCS have other type of associates such as companies and/or institutions.
- The membership fee is different for seniors and companies/institutions.
- Almost all their missions are abroad, having currently projects in several countries in Asia, Africa, and Latin America.
- APCS has a common practice the creation of teams when the job requires it.
- The missions' assignments have proper rules:
 - For short term work all costs are supported by the beneficiary;
 - In long term work, the APCS association receives a small percentage;
 - Work with more than a week of duration should give a little remuneration or fringe benefits to the senior;
 - When going abroad, and when work extends beyond three weeks, senior/team should come back from time to time.
- APCS is looking forward to good ICT supporting tools.

3.7 TRE7: Meeting with the Social Network Company

Place: London, United Kingdom

Date: July 2008

Number of attendees: 2

Meeting held at White Loop Office to describe project and receive feedback. (**Jul-08**)

A meeting was held between Will Leonard and Tom Alcott, Managing Director of the UK Social Network Software Company. The purpose of the meeting was to learn about the state of art in social network software.

The main lessons learned were:

- Tom Alcott explained how social network can be optimised by performing social network analysis (SNA) - using social graphs in the form of network maps.
- Network maps can quantify the value of individual connections within a network and provide network managers an overall view of the weak and strong areas of a network.
- Network maps also illustrate degrees of separation between two individuals/organisations within a network, providing clear pathways to knowledge, services and potential clients.
- Network maps can be adapted to the needs of individual industry.

3.8 TRE8: Workshop in Maastricht

Place: Maastricht, The Netherlands

Date: 14 July 2008

Number of attendees: 12

Contrary to the previous workshops, which were devoted to associations of senior professionals and their role in the silver economy, this workshop was partially addressing the intermediary roles between the elderly community and the socio-economic system, and partially introducing some important technical areas that have the potential of offering new solutions for the ePAL context.

The 1st speaker, Drs. Jean M.J. Severijns from the Province of Limburg (NL), shared his experience on the involvement of the retired professionals in the active society through the Limburg network. In his presentation, he specifically addressed the need for intermediaries to facilitate interactions between the senior professionals and the recipients of their services.

In the 2nd presentation, Drs. Henriette Cramer from the University of Amsterdam addressed the area of social aspects and affective computing in relation to interacting with computers and each other online. She addressed the need for adapting technologies to meet the requirements

of the ePAL environments and to properly support the involvement of senior professionals in the silver economy.

Maarten van Someren from the University of Amsterdam addressed the topic of collaborative problem solving. He pointed out that society problems are challenging to be solved by individuals; however they can also be solved in groups and in different ways. Thus a challenge is selecting the optimal solution that can satisfy all involved actors. He proposed the use of approaches from the discipline of artificial intelligence for collaborative problem solving. Such ideas have a potential application in the planning of teams of seniors to address complex consultancy jobs.

Lessons learned: Following are the main lessons learned from the presentations.

1. Related to service provision by senior professionals (Drs. Jean M.J. Severijns)
 - The perception of being an old person needs to be avoided, particularly for retired professionals who do not wish to be identified and referred to as retired or old. Another name, which is more professional and that can be accepted by all parties, needs to be suggested. One possibility is “senior professional”.
 - There is still no clear picture on what will be the return on investment when involving the retired professionals. Consequently, organizations are reluctant to using the retired professionals and thus they become unwilling to invest in them.
 - Retired professionals are not interested in going and finding problems that need to be solved at SME’s environments. But when a problem is defined by a third party, the retired professionals can assist to effectively provide the needed solutions. There is a need for putting in place some mechanisms to act as **intermediaries**.

2. Related to social aspects of interacting with computers & each other online (Henriette Cramer)
 - There is still a lack of specific technology developed to support the participation of elder people in economical activities taking into account their physical and age status.
 - There are a number of technologies which need to be adapted to fully meet the requirements of supporting elder people for the purpose of enhancing their activeness. A number of aspects need to be considered when adapting a particular technology supporting ePAL environment operations in relation to affective and social computing, such as (i) users’ experience, persuasion and trust, (ii) easier usability and accessibility, (iii) users’ differences and changes, (iv) support for affection and attention, addressing issues like belonging, interaction in community, (v) enhance bonding and commitment in the society.

3. Related to affective computing (Henriette Cramer)
 - Affective computing is promising to support elders in relation to detecting their emotions.
 - There are a number of issues that are being addressed to support users with trusting a system for a specific task. One general issue regarding trust to the system by users is in relation to their perceptions.
 - The following two elements were learned to be important for affective computing:
 - **Persuasion**: A number of aspects need to be considered while developing a system to persuade users, such as: social acceptance, connectivity, facilitation, etc.
 - **User adaptivity**: Any interactive computing system designed to adapt to affection/motivation should have interface to support accessing the knowledge of retired people and also to support finding suitable work-partners.

4. Related to collaborative problem solving (Maarten van Someren)

Collaborative problem solving process constitutes several agents (people) performing several steps in parallel. There are several challenges that need to be addressed to facilitate the collaborative problem solving process, such as: (1) related to the communication among agents; in particular, when to communicate and what language to use while communicating, (2) involved agents pursue other different goals that might even be contradicting with the common goal, and (3) there might be several alternative solutions

to the problem and thus it is challenging to find an optimal solution which both meets the common goal and the individual goals.

3.9 TRE9: Workshop in Poznan

Place: Poznan, Poland

Date: 10 September 2008

Number of attendees: 13

This workshop was organized in association to the PRO-VE'08 conference. On this event, not only senior associations were invited. Some external experts were also invited. The main aim was on one hand to get the invited participants involved in the ePAL perspective and current vision, and on the other hand to get their feedback, personal experiences and suggestions. An important goal was to collect elements on the situation with active ageing in East Europe.

The invited participants were two senior associations: KOS from Warsaw with the presence of its president Mr. Jan Kossakowski (www.fundacijakos.pl/) and VIS-VITALIS from Poznan represented by its founder and informal head Mrs. Aleksandra Plackowska, together with Professor Zenon Sheider and Dr. Anna Sawińska; and three other institutions: PUE (<http://www.ue.poznan.pl>), ITESM (www.itesm.mx/) and EPFL (<http://www.epfl.ch/>), all represented by some experts.

With the aim of giving the participants the ePAL baseline and current vision, the ePAL coordinator introduced the main topics and objectives of the project. Then the session was opened to all other participants in order to discuss the current trends and needs in the area.

The main lessons learned were:

- One difficulty of the traditional types of associations is that senior people more and more need to seek ways of obtaining extra income in addition to their pensions; this limits their interest on / availability for voluntary activities;
- It is still of huge importance to prevent loneliness and social exclusion;
- A great number of the members of these associations have high education, and some are willing to work on a voluntary basis (depending on the social level and context) but the economic conditions are particularly critical in some countries, namely in the East Europe;
- One of the main barriers that these senior associations face is the lack of new members;
- One of the main reasons for senior people not to look for such voluntary associations is the familiar context. In most cases they are the support of the younger generations and are responsible for taking care of their grandsons;
- The most relevant topics for this audience were the social and the economic topics;
- The balance between this familiar/social/professional issues can really represent the equilibrium for active ageing.

3.10 TRE10: Workshop in London

Place: London, United Kingdom

Date: 21-22 October 2008

Number of attendees: 16

A number of individuals from varying disciplines were invited to two separate workshops held in London to present their organizations and contribute their ideas, opinions and experience. The participants were invited with the aim of involving them in the discussions around forming an effective vision for active aging of Senior Professionals in the EU.

The workshop on the 21st had a focus on the socio economic issues surrounding active aging. The first speaker was Prof Harry Gray from the Department of Work Related Studies at the University of Chester. Prof Gray is also Head of the Emeritus College an organization based in

the Northwest of England looking to map and leverage the skills of seniors in that area. He spoke to the ePAL Consortium about the economic impact of extending the professional active life of retired people. Martin Suenson, Founder of Dinosaur Exchange, an online Senior Volunteer Network spoke about the barriers faced by his organization and those faced by senior networks in general. Andrea Baron, Policy Manager at Age Concern, the largest charity for the elderly in the UK with a focus on preventing social & economic exclusion, spoke about the barriers facing senior professionals and policy towards facilitating the extension of active life.

The workshop on the 22nd moved the focus of the consortium to new areas of technology and organizational systems, relevant to the extension of active life. Pietro Panzarasa, Senior Lecturer in Organizational Theory and Behaviour at Queen Mary University London provided the Consortium with an Overview of the social networking "concept" and trends as well as relevant platforms for the implementation of social networks / virtual communities. Dr Nadia Bianchi-Berthouze, Lecturer at the UCL Interaction Centre (UCLIC) (University College London) gave an insight into the possibilities of Affective Computing technology, and its future implications for ePAL. The last speaker was Dr Vesna Brujic-Okretic, Head of the Department of Information Science & School of Informatics at City University, London. Dr Vesna provided an introduction to the technical, cognitive and social (to a degree) side of social computing, social networking and other Web 2.0 technology related activities.

Main lessons learned from the two days of the workshop:

21st of October

- Traditional stark divisions between those of working age and the retired may well become obsolete as an emphasis on lifelong learning, retraining and a need for a constant update in skills will turn what it now considered retirement age just another phase in a person's working life. The dynamic between employer and employee and the nature of work is changing.
- Seniors professionals need more access to ICT retraining to ensure that they are on top of their technological needs.
- Entrepreneurship, not traditionally seen as the domain of seniors, is a good way for senior professionals to capitalize on the knowledge and skills they have learnt over their working lives. This is once again, an area where seniors need more support in.
- 60% of retired people in the UK suffer from some kind of depression.
- Age Concern had conducted studies which demonstrate that many seniors still feel discriminated against in their workplace and subject to unjustified negative preconceptions concerning their abilities. However, senior's willingness to do something does not necessarily translate to ability. There needs to be a proper assessment of how people's abilities change over time, so that senior professional associations can properly market the services they offer.

22nd of October

- Virtual communities develop and react in a predictable, organized way. Cutting edge social networking software enables intermediaries and brokers to increase the interaction within online communities. With the use of such software, brokers are able to accurately measure the development of virtual networks and stimulate new interaction.
- Affective (emotionally intelligent) computing can potentially help solve communication problems where cultural barriers exist. This is true of problems related to both national culture and age differences.
- Affective computing can also help measure the emotional development of online networks.
- Computers are binary, providing "yes" or no "answers". Affective computing can improve human and computer interaction by helping computers gauge what "seems" to be the case.
- Technology is becoming more and more embedded and invisible which brings up a number of ethical issues.
- Seniors need to start producing more user generated content and in order for them to do this, more user adaptable technology is needed. This means helping reduce

applications to only those needed by the senior professional user. However, any reduction/adaptation of applications must avoid ghettoizing the senior professional technologically and reduce the potential stigma of "technology for seniors". Adaptation cannot come at the expense of compatibility with other types of user.

3.11 TRE11: Meeting at the Emeritus College (UK Senior Association)

Place: London, United Kingdom

Date: November 2008

Number of attendees: 4

This meeting was held at The Emeritus College and had as purpose the presentation of project ePAL and to learn about issues affecting senior professionals within a regional context.

The main lesson learned was:

- The launch of Emeritus College provided evidence of some 50,000 retirees in the North West of England alone who are not provided with the opportunity to leverage their skills in a volunteer capacity as there is no record of the knowledge and experience they offer. Emeritus College intends to record these skills classify and group them by industry and interest into "Guilds", the managers of which will market them to a potential recipient (pro bono) client base.

There was much evidence to show that the organisational barriers of seniors specifically in the North West were reflected in those identified as affecting the wider EU senior population.

3.12 TRE12: Meeting with other ICT & Ageing roadmapping projects

Place: Brussels, Belgium

Date: 30 January 2009

Number of attendees: 9

This meeting was held at the Enterprise Ireland facilities in Brussels and was focused on consolidation of results from 4 complementary roadmapping projects:

- AALIANCE
- CAPSIL
- ePAL
- SENIOR

Each project was represented by its coordinator and one additional partner. The summary presentations made by each project gave the background to identify the complementarities among the 4 initiatives. An extended discussion period led to the identification of the interest and potential of joining efforts towards a comprehensive and sustainable continuation of roadmapping activities after the end of these projects.

An EC project officer (Peter Wintlev-Jensen) was present for a short period, giving a presentation of the Commission's goals regarding a future roadmap.

4. DISSEMINATION AND AWARENESS EVENTS

As the first phase of the project was devoted to requirements elicitation and the preliminary steps of the preparation of the roadmap, only recently the dissemination activities started. The rationale is that stakeholders are getting tired of listening to projects just presenting goals and plans; what really interest them are results (which obviously are not available in the first phases of any project). This type of events will be substantially increased in the next phases of the project as more results become available.

4.1 DAE1: Workshop in Coimbra

Place: Coimbra, Portugal

Date: 23 October 2008

Number of attendees: 39

UNINOVA, representing the ePAL project, was invited to participate on a Portuguese workshop on research strategies for elderly support with the main aim of developing a national strategy for the usage of ICT in the elderly support.

This workshop was attended by a representative of the NETCARE project, which is a national project coordinated by the University of Porto. This project is linked with the usage of wireless sensors in the health care of the elderly. With this presentation, several issues were raised, namely the ethical issues. Another project that was represented at the workshop was the TIO project led by the VIDA association.

A brainstorming session focused on social and technological topics. The main subtopics that were discussed were: getting old in society, getting old at home, and getting old at work. For ePAL, this last item was the most related. Here some items were pointed out as of huge relevance, such as:

- Contribute to the “be useful” feeling;
- Contribute to the society;
- Create benefit for the society;
- Create a structured community;
- Facilitate the transition from the retirement to getting older.

After this brainstorming some representatives from related national public institutions, such as:

- QREN (National Strategic Reference Framework (NSRF)),
- a representative from the national coordination for the Lisbon strategy and technological plan, and
- UMIC (Knowledge Society Agency) also gave their views regarding possible strategies.

All affirmed that the subject of elderly support and active ageing is of extreme importance and project initiatives in the area are very welcomed not only at a national level, but also at a more general level such as the European Union.

4.2 DAE1: Workshop in Madrid

Place: Madrid, Spain

Date: 10 December 2008

Number of attendees: 32

This was the first dissemination event specifically organized by ePAL to discuss its first results and collect feedback from interested stakeholders. The event included a number of presentations and sessions for discussion.

ePAL Project overview

Speaker: Professor Luis Camarinha-Matos

Objectives of the presentation:

- To present to the attendants the ePAL project and the results we have obtained regarding the baseline (*Where we are now*) and the vision (*Where we want to go*).
- To make a first validation of the results obtained.

The coordinator of the consortium presented a general project overview. He mainly focused on the results obtained on the baseline and the vision. The presentation was followed by an extensive period of questions and answers.

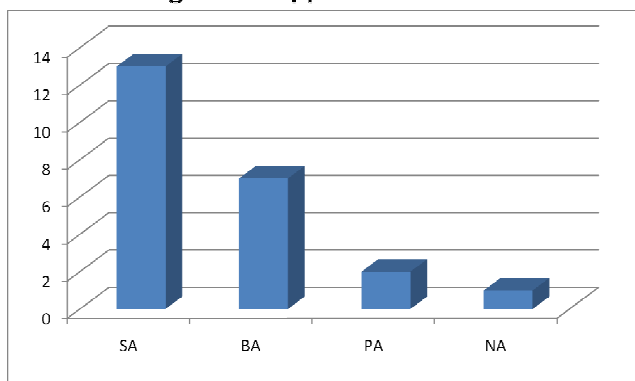
In general the opinion of the assistants (senior professionals) about the project was quite positive. They think that the project is very interesting. In their opinion the project’s vision could be a solution, in a long term, for the actual situation of the senior professionals and the social security system.

Discussion & comments:

- It would be good to consider the existing differences, regarding the situation of elders, between South and North Europe, for instance, the interest of being active it is not the same in all the countries.
- The importance of establishing training programs during the transition period to the retirement. It is important to prepare elders for the retirement, that is, to give the information/training necessary in order to avoid a traumatic transition.
- There is still a negative vision of the society. People think that if elders remain professionally active younger people will have problems finding a job or being promoted.
- It is increasing the number of people who demand the voluntary retirement and who are opponents to the “obligatory retirement”.
- Putting the emphasis in voluntary work will not solve the problem, if elders cannot maintain their quality of life with the pension they perceive, they won’t want to work on a free basis.
- It would be necessary for project’s ideas success to have the support of the business and the financial sectors.

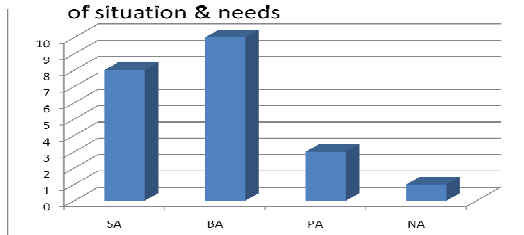
Based on a questionnaire distributed to the participants, the following feedback (assessment) was collected.

Relevant general Approach

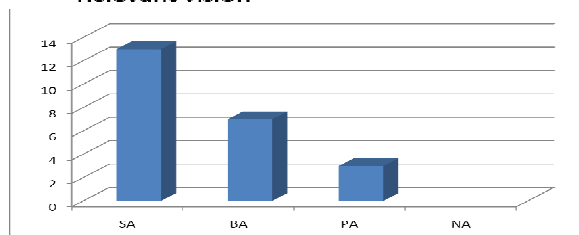


SA – strongly agree
 BA – Basically agree
 PA – partially agree
 NA – Not agree

Achieved good understanding of situation & needs



Relevant vision



Active aging research and promotion

Speaker: (Jubilee) Professor Rocío Fernández-Ballesteros. Universidad Autónoma de Madrid.

Presentation:

- The life expectancy without incapacity in Europe is increasing.
- The EU is increasing the proportion of the budget dedicated to elders. A great number of projects address the elder' situation. But most of these initiatives are focused on care provision and the improvement of quality of life of elders. Elders perceive the lack of research regarding areas related with work, retirement and training.
- What does active aging means? What do elders think it is necessary for maintaining an active life? :
 - Remaining in good health until death
 - Feeling satisfied with life
 - Having friends and family
 - Being able to have care of myself
 - Remaining free of chronic diseases
 - Continuing to learn new things.
- Two examples of European projects that focused on active aging (from the Social Sciences field):
 - EXCELSA: The main objectives of the project were to investigate the role of socio-environmental, psycho-social and bio-physical determinants of changes in health and competence over the life span and to assess differences between European countries on aging.
 - Vital Agell-C: This Project is a good example of how promoting positive aging.

Experiences with using the help of seniors

Speaker: Fátima Rodríguez García. Anagrama Comunicaciones y Marketing.
Rosa Marín Pinilla. Anagrama Comunicaciones y Marketing

Presentation:

- These young entrepreneurs from Seville gave a testimony of their positive experience with getting advice / mentoring from senior professionals.
- They participated in the project "CREA con seniors" (Create with seniors). This Project is supported by Sevilla Global (Regional Development Agency) in collaboration with SECOT. In this project senior professionals give advice and mentoring to younger entrepreneurs.
- The steps they took in order to participate in the program were:
 - Sending the application form.
 - After a meeting with the organization, they were selected to participate in the program.
 - Sevilla Global matched the necessities of the company with the experience and knowledge of the senior professional.
 - 3 meetings:
 - First one was in order to know the project and to analyze the possible actions.
 - In the second meeting the viability of the actions was analyzed.
 - Last one was in order to verify that all the actions were developed and to analyze the results obtained.
- They highlighted the good experience they have had from the program and the high support received from the senior professionals.
- They believe that the project is a good idea and not only for the senior professionals but also for the society in general.

- They think that it would be important that the collectives who have benefited by the experience of seniors claim their presence in the society.

The evolution of seniors. New paradigms

Speaker: (Jubilee) Professor Juan Díez, *Univ. Complutense de Madrid*

Presentation:

He talked mainly about the demographic situation:

- The demographic structure of the population is changing from a pyramidal figure to a rectangular figure, this means that the number of people over 65 is increasing and the number of people under 20 is decreasing.
- What is the solution typical for this situation?
 - Immigration
 - Natural growth.

Neither of these solutions is appropriate or optimum.

- “The social structure has to accommodate to the actual situation (ageing) and not in the opposite direction”.
- The retirement must be voluntary; it means that it must be a right not an obligation.
- In the beginning, jubilees are happy with the retirement; the problem appears when they have to maintain the same quality of life with the pension they perceive.
- In the future, due to the problem of the decreasing of the pensions, senior will have to do paid activities.
- Active aging has to respect the freedom of people. It is not right to say that if elders remain active there will be less work for youngsters; governments should create enough work for all. It is necessary a change in the social infrastructures.

Virtual Communities of seniors

Speaker: Lourdes Iglesias. Fundetec.

Presentation:

- Foundation for the Technological Development of Entities and Society. The foundation is supported by the public entity, red.es, from the Ministry of Industry, Tourism and Commerce and the private sector (El Corte Inglés, HP, Intel, Telefónica and Caja Madrid).
- Objectives:
 - To disseminate ICT in the society in Spain, and
 - To reduce the digital gap between citizens and SMEs.
- Virtual Community project:
 - Project developed by Fundetec with the collaboration of SECOT.
 - It is a project supported by the “Plan Avanza” (Ministry of Industry, Tourism and Commerce).
 - The project combines the experience and knowledge of senior professionals with ICT (Social networks based on web 2.0).
 - The main objective is to give voluntary and continuous (24h) advice to SMEs and entrepreneurs.
 - Before launching the virtual community it was necessary to give a training program for the seniors. During this course they learned how to use the platform.
 - Structure of the Community:
 1. *Free Access part:* this part of the platform has the “library of the entrepreneur”, which contains all the information necessary in order to

solve the “normal” questions that arise when an entrepreneur creates a company.

- 6 areas: marketing, financing, human resources, micro company, the company in Internet and other topics.
 - It contains 30 items developed by 16 senior professionals from SECOT.
 - Each area is led by two mentors from SECOT. Each of them has a blog in which they give their opinions about different items.
2. *Interaction part:* This part contains the virtual community. Through this virtual community senior professionals offer their consultancy services to the entrepreneurs and SMEs members.

Overview of SECOT Activities

Speaker: Teófilo del Pozo, General Secretary of SECOT

Presentation:

- He talked about his experience in maintaining an active life after retirement.
- He is involved in several committees of companies and NGOs.
- He believes that is very important to maintain an active life after retirement.
- The general structure, objectives and activities of SECOT were summarized.

5. NEXT STEPS

In addition to the periodic consortium meetings, the next phase of the project will include the planned Consensus Building Events and an increase of the Dissemination and Awareness events.

CBE – Consensus Building Events

A total of five consensus building events (CBEs) are planned for the next semester. The geographical distribution of these CBEs is planned as follows:

- one in Portugal
- two in Spain
- one in the Netherlands
- one in the United Kingdom.

The CBEs will consist of a full day event with approximately 20 invited attendees each. Preferably, the attendees should be experts in different domains such as stakeholders, entrepreneurs, professors, among others; with a visionary mind. The general plan for the full day is as follows:

10:00	<i>Welcome</i>
10:10	<i>General introduction to ePAL</i>
10:30	<i>Methodology (for the meeting)</i>
10:45	<i>Baseline summary</i>
11:00	<i>Coffee break</i>
11:30	<i>Working groups on baseline (3 groups)</i>
12:30	<i>Summary of conclusions</i>
13:00	<i>Lunch</i>
14:30	<i>Vision summary</i>
14:45	<i>Working groups on vision (3 groups)</i>
15:45	<i>Summary of conclusions</i>
16:15	<i>Actions summary</i>
16:30	<i>Coffee break</i>
16:45	<i>Working groups on actions (3 groups)</i>
17:45	<i>Summary of conclusions</i>
18:15	<i>Conclusions</i>
18:30	<i>Closing</i>

The working groups will revise the draft roadmap (baseline, vision, and actions) and give feedback for improvement. Some recommendations for each working group:

- Mix of expert's background.
- 1 coach per group (from the consortium) that is responsible for collecting all information.
- 1 speaker (selected among the WG people) responsible to make the plenary presentation.

DAE – Dissemination and Awareness Events

- **2 or more** EU-wide CBEs
- Other local actions

Preliminary plans (dates and places), to be confirmed:

- CESES conference / Brussels – 1st semester of 2009
- SEN@ER or CEOMA – end of 2009
- PRO-VE'09 – session on active ageing / Thessaloniki – Oct 2009.

**ePAL
Deliverable D5.1a**