

SEVENTH FRAMEWORK PROGRAMME

ICT and Ageing



D5.1b

**Interim Report on
Consensus Building Events**

- Porto 17th June 2009 -

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D5.1b – Interim Report on Consensus Meetings – CBE Porto

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Abstract:

This report summarizes the main conclusions of the first Consensus Building Workshop held in Porto, Portugal.

A series of such events are being organized in different regions of Europe with the purpose of collecting feedback and reaching consensus on the planned roadmap for extending professional active life.

TABLE OF CONTENTS

INTRODUCTION	5
SESSION ON BASELINE	9
SESSION ON VISION	16
SESSION ON ACTIONS	23
CONCLUSIONS	28

INTRODUCTION

This report summarizes the results of the consensus building workshop held in Porto on 17 June 2009.

This workshop was organized as a special working session devoted to collecting feedback and suggestions for improvement from relevant stakeholders regarding the current draft of a strategic plan for extending the professional active life.

AGENDA

- 09:30** Welcome
- 09:45** General introduction to ePAL – goals and findings (Luis M. Camarinha-Matos)
- 10:30** Methodology for the meeting
- 10:45** Baseline summary – current situation on active ageing and silver economy (Filipa Ferrada)
- 11:00** Coffee break
- 11:30** Working groups – discussion of baseline
- 12:30** Summary of conclusions (plenary)
- 13:00** Lunch
- 14:30** Vision summary – a new strategic vision for active ageing and silver economy (Hamideh Afsarmanesh)
- 14:45** Working groups – discussion of vision
- 15:45** Summary of conclusions (plenary)
- 16:00** Proposed strategic actions – social, organizational and technological perspectives (Luis M. Camarinha-Matos)
- 16:15** Coffee break
- 16:45** Working groups – discussion of actions
- 17:45** Summary of conclusions (plenary)
- 18:00** General conclusions and next steps
- 18:30** Closing

LIST OF PARTICIPANTS

Name	Organization	email	Area of Activity / Expertise
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WORKSHOP SESSIONS OUTLINE

Initially the participants were divided into 4 working groups of 5/6 people each who received a complete set of forms regarding the components of the roadmap. The week before the event a package of information including the draft version of the roadmap was sent to the confirmed participants.

The project coordinator welcomed the participants and made an overview presentation of the ePAL project as well as of the status of the roadmap.

The goal of this short presentation was to refresh the main concepts and get a common starting point for the workshop discussions as well as avoiding misinterpretations. The ePAL study of the baseline, vision and its instantiation and suggested research actions were briefly introduced at the beginning of each working session.

The following sections summarize the results of the various working sessions – baseline, vision and research actions –including the votes of participants and suggested modifications to the draft roadmap.

Please note that not all participants voted on all items, what justifies some differences in the total number of votes per item. This is due to the fact that some participants were not familiar with some of the topics under discussion. ePAL consortium members did not vote.

Working Groups

Group 1	Group 2	Group 3	Group 4
Ângelo Martins	António Abreu Freire	Davide Carneiro	Carla Neves
Gil Gonçalves	António Fonseca	Joana Guedes	Fátima Paz Gago
José Dias Correia	Jorge Miranda Dias	Manuel S. Carneiro	Ignácio Martin
Marcos Lopes	Jorge Monteiro	Marielle Gros	Joana Carvalho Silva
Maria João Carrelhas	Luis Santos Guerra	Paula Sande Nieto	João Filipe
Teresa Almeida Pinto		Vânia Alexandra Couto	Paula Cruz
Hamideh Afsarmanesh	Jim Playfoot	António Dominguez	António del Cura
Will Leonard	Simon Msanjila	Filipa Ferrada	Ana Inês Oliveira
	Patrícia del Cura		
Luis M. Camarinha-Matos			

Which other issues of your concern?

1. The global trend is accurate but there are big differences between countries/areas:
 - The trend will emerge later on southern Europe, due to the lower education level.
 - Gender will be more than an issue in southern countries, where grandmothers are a very key element in the children care network (e.g. Italy).
2. What is a “Senior Professional”? Only white collar retired (ICT, Engineer, etc) or also other skilled workers (Carpenter, Mechanical)?
3. Europe is becoming more and more aware of the need to change policies concerning senior experts. Therefore the basic suggestion now is to have small institutions to put their efforts together to become more “visible” and active.
4. The elderly associations can’t be ghettos of old people but open to the interactions of other generations, because old people resist being with old people. The lost of employment of young people will lead them to try to associate with an institution that can help them remaining active.
5. The balance between individuals and team work – incentive mechanisms are needed. Implement actions to promote collaboration.
6. The moving from individual to cooperative work should be increasing, both due to the crisis and the need of “team work”. However it requires good and simple control systems to work out correctly and getting value added.
7. Business models or marketplace level of sophistication can also be a good dimension of analysis.
8. Simplicity is an issue.
9. Get at least paid expenses. Giving some payment to the active senior professionals could be good. A kind of retribution has a direct effect on the wish of seniors to be active and involved in society.
10. The bubble must be bigger and to have into account the collaborative networks with associations and also the individual work.
 - People are used to work individually; people only join efforts for a particular topic.
 - The collaborative work is a trend and the technology (for instance internet) is helping to achieve this trend.
11. There are a large set of seniors offering voluntary services, nevertheless this is a “not remunerated” work. A strong effort should be made on integrating seniors in companies and being remunerated for the services they perform.
12. However, giving activity to seniors until the time they wish might increase the serious unemployment problem.
13. The benefits should not be only measured in economical terms.
14. There are vulnerable groups with characteristics to be considered.
15. Creation of alternative senior employment modalities, where it could be permitted to older workers remaining in their working places transmitting to younger workers their experience and knowledge.
16. It is important to preserve the individual person wish and his interest to be integrated or not on a collaborative network.
17. When such networks exist they should be made known in order that all have access to the main information.

- 18. Seniors could work individually but in contact with networks, providing them to work as a team when they needed.
- 19. Training in ICT is fundamental.

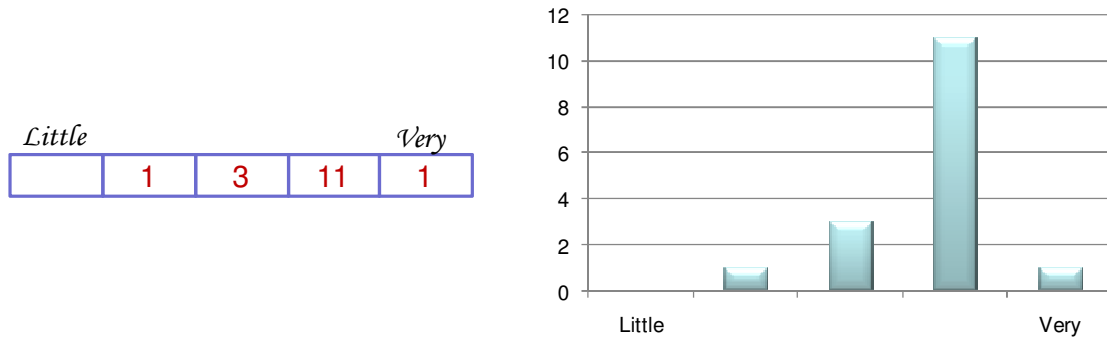
BASELINE – MAIN PERSPECTIVES

Participants were also asked to give their opinion based on the baseline statements according to the social, organizational and technological perspectives:

<p>BASELINE – SOCIAL PERSPECTIVE</p> <ol style="list-style-type: none"> 1. Demographic Shifts <ul style="list-style-type: none"> 1.1 Larger percentage of seniors & skills shortage 1.2 Inter-generational knowledge transfer needs 1.3 Need for seniors to keep generating value 2. Social welfare mechanisms <ul style="list-style-type: none"> 2.1 Pension systems – a notable European creation 2.2 Two main schemes: 1) Fully state-paid pensions or 2) base pension state-paid + private complements 2.3 Special pensions for some groups (e.g. civil servants) 3. New adaptable frameworks to facilitate social collaboration <ul style="list-style-type: none"> 3.1 Some (voluntary) initiatives promote knowledge transfer, namely to SMEs 3.2 Mentoring: Seniors help younger workers 4. Mechanisms to enable social cohesion <ul style="list-style-type: none"> 4.1 Many not-for-profit organizations – philanthropic activities & key role in local communities 4.2 Limited involvement in active economy 5. Frameworks to support social knowledge & experience exchange <ul style="list-style-type: none"> 5.1 Affective computing & social networks likely to facilitate intergenerational communication 5.2 Some pilot experiments 6. New human resource policies <ul style="list-style-type: none"> 6.1 Some HR departments start to be concerned with planning for ageing 6.2 Older workers require different benefit packages 6.3 Employers start to consider structuring pay around performance rather than seniority 7. New approaches to promote life-long learning <ul style="list-style-type: none"> 7.1 More flexible training needed to follow market changes 7.2 New models (e.g. flexicurity) being discussed <p><i>Do these accurately reflect current reality?</i></p> <p>Little <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Very</p> <p><i>Which other relevant issues are missing?</i></p> <p><i>Which of these issues are not accurate?</i></p>	<p>BASELINE – ORGANIZATIONAL PERSPECTIVE</p> <ol style="list-style-type: none"> 1. Employment and retirement policies <ul style="list-style-type: none"> 1.1 Active and paid activity vs. unions' early retirement agendas 1.2 Low level pensions: need extra income (in some regions) 1.3 Developing areas: 1) increase the retirement age, and 2) possibility of earning extra benefits for services rendered 1.4 New forms of employment (e.g. part-time), not a practice yet. 2. Global regulations & policies regarding collaboration <ul style="list-style-type: none"> 2.1 New forms for companies keeping links with former employees. 2.2 Increasing number of senior associations that try to help SMEs unable to afford consultancy companies. 2.3 Private sector needs adjustments to accommodate older workforce. 3. Use of knowledge & skills to generate wealth and innovation <ul style="list-style-type: none"> 3.1 Senior professionals need to remain active in socio-economic terms 3.2 Some mechanisms: jubilee professor, time bank, freelancing 3.3 Skills shortage & keeping HR: knowledge transfer (senior->young) 4. New intermediation forms to provide brokerage <ul style="list-style-type: none"> 4.1 Difficulty of individuals in acquiring work opportunities. 4.2 Need for entities providing mediation services (senior-client). 4.3 Some existing organizations start to help seniors in finding paid jobs. 4.4 Lack of ICT: No adequate profile/competency models. 4.5 New collaboration tools tend to lead to new organizational forms. 5. Financial support to associations and other intermediaries <ul style="list-style-type: none"> 5.1 Most organizations depend on membership fees (not enough) and sponsors (public and/or private). 5.2 Most organizations operate on a passive basis, thus lack of work. 6. Seniors' access to (re)training services <ul style="list-style-type: none"> 6.1 Insufficient re-training: it must be improved. 6.2 "Classical" universities do not yet offer education to seniors. 6.3 Education and employment in EU needs to be more flexible: to react to the demographic changes. 7. Organizational culture embracing seniors & pre-retired professionals <ul style="list-style-type: none"> 7.1 Emergence of mechanisms and organizations to help seniors remaining professionally active and fighting the negative stereotypes surrounding older workers. 7.2 Associations are composed of "professional elite". Good pensions. <p><i>Do these accurately reflect current reality?</i></p> <p>Little <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Very</p> <p><i>Which other relevant issues are missing?</i></p> <p><i>Which of these issues are not accurate?</i></p>
<p>BASELINE – TECHNOLOGICAL PERSPECTIVE</p> <ol style="list-style-type: none"> 1. Theoretical foundation for technological developments <ul style="list-style-type: none"> 1.1 Good progress on conceptual models for collaborative networks. 1.2 Need to adapt/extend CN results to the senior professionals area. 1.3 Research needed on "soft issues": trust, collaboration readiness, etc. 2. Collaboration support services, including teams' formation <ul style="list-style-type: none"> 2.1 Management systems for VBEs and PVCs: still limited use in real practices. Wide availability of CSCW tools. 2.2 Configurable document management platforms becoming available. 2.3 Creation of a culture of content sharing (e.g. YouTube) still problematic. 2.4 Unresolved issues: IPR, ethical issues, ownership and protection. 3. Support for user-generated knowledge content <ul style="list-style-type: none"> 3.1 First cases of user configuration of HIS/her interface functionalities. 3.2 Need creation of libraries of components and proper interoperable reference architectures. 4. "Configure yourself" based philosophy infrastructure <ul style="list-style-type: none"> 4.1 Importance of adaptive interfaces & user interface customization. 4.2 Automatic adaptation to different output channels. 5. Easily adaptable and customizable user interfaces <ul style="list-style-type: none"> 5.1 Developments on value systems for CNE: no practical tools yet. 5.2 Lack of sound models & tools for IPR and risk management in CN. 6. Tools supporting the process of value creation <ul style="list-style-type: none"> 6.1 New research areas: focus on perception/recognition of emotions. 6.2 Human affects & emotional experiences linked to human learning. 6.3 Usage of emotions to regulate virtual environments - promising. 7. Affective computing and context aware enriched environments <ul style="list-style-type: none"> 7.1 Contract models re-contracting – still research issue. 7.2 Some negotiation prototypes, but not yet practical. 7.3 Some e-institutions but not integrated in collaboration platforms. 7.4 Recent trend – negotiation wizards. 8. Contractual and cooperation agreements & negotiation <ul style="list-style-type: none"> 8.1 Service oriented approaches – popular but not easy. 8.2 SMEs & seniors contact: not very SOA-skilled, lack of proactive services and templates library consultancy services. 9. Marketing and brokerage services <ul style="list-style-type: none"> 9.1 Some examples of virtual communities exist. Lack of effective intermediation roles. 9.2 Current communities: limited team work, brokerage, collaboration. 10. Networking models for elderly communities <ul style="list-style-type: none"> 10.1 Mechanisms & tools for safe communications: Building blocks available, but difficult to integrate. Need for reference architectures coping with leisure / social / professional activities. 11. Security and ethical / privacy support <p><i>Do these accurately reflect current reality?</i></p> <p>Little <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Very</p> <p><i>Which other relevant issues are missing?</i></p> <p><i>Which of these issues are not accurate?</i></p>	

Baseline on Social Perspective

Do these accurately reflect current reality?



Which other relevant issues are missing?

1. There are incentives for younger people to create businesses but there are no incentives for older people to become entrepreneurs.
2. The baseline social perspective definitely reflects current reality. In my opinion, actually the tendency is fast increasing.
3. The leisure aspects are missing or not clearly emphasized.
4. The social perspective should reflect the differences between countries.
5. Better intergenerational knowledge transfer (seniors – children) is needed.
6. There is a lack of possibilities for seniors after retirement continue working on their companies in order to transfer knowledge.
7. Information on the diversity of the existing human resources (seniors) is not reaching the final recipients and should be spread out.
8. Cooperation between entities with common goals is missing.
9. Realization of gerontologic plans at the autarchy/local level defining research/actions modalities of seniors' necessities (social politics for the elderly) is needed.
10. It would be important to demonstrate the negative aspects of the *flexcurity*. How can we have flexibility when the pensions are so low?
11. Differentiate between seniors, industry and services.
12. There is some recent interest on senior' skills/knowledge and its effective importance.

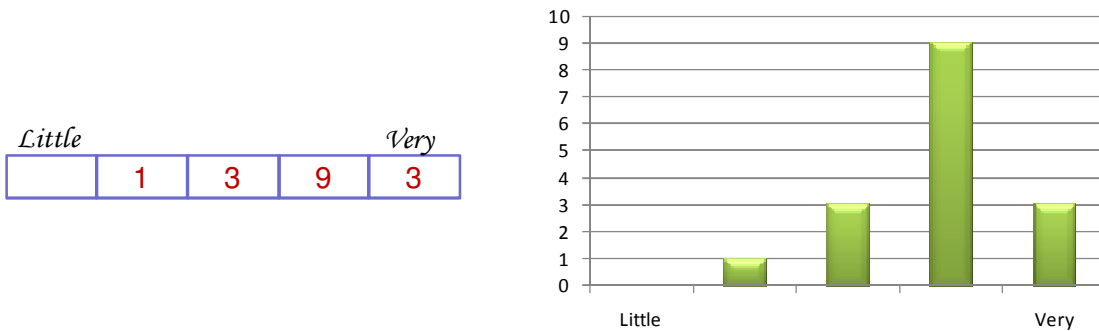
Which of these issues are not accurate?

1. In relation to **3.2**: Mentoring is not a common practice in Portugal, especially in SMEs and public entities.
2. In relation to **1.2**: Is knowledge management in organizations already present?
3. Point 3. Is not accurate in Portugal. We don't see initiatives relating to it.
4. The current reality in Portugal and other countries in EU are very limited in these topics.

5. It should be given more expressivity /visibility to the emergence/creation of new technologies for seniors.
6. Point 6. There are not (currently) human resources policies.
7. Point 4. There are not (currently) enough mechanisms to enable social cohesion.
8. Seniors are not seen yet neither as a value added nor the preference for young people when they need help.

Baseline on Organizational Perspective

Do these accurately reflect current reality?



Which other relevant issues are missing?

1. In relation to 1.4:
 - a. New forms of “virtual” employment are needed.
 - b. It is important to highlight that in spite of existing flexible work forms, these new forms are still little qualified and not well paid.
2. There is a trend for elderly to become entrepreneurs instead of employees. There should be special funds to help them.
3. In this unstable market, the cost with training is not a possibility some companies want to have.
4. In 1.1 – Missing/refinement: Unions generally oppose the extending of working life and partial work.
5. SMEs’ associations do not have a significant role in sensibilizing companies for the importance of seniors work.

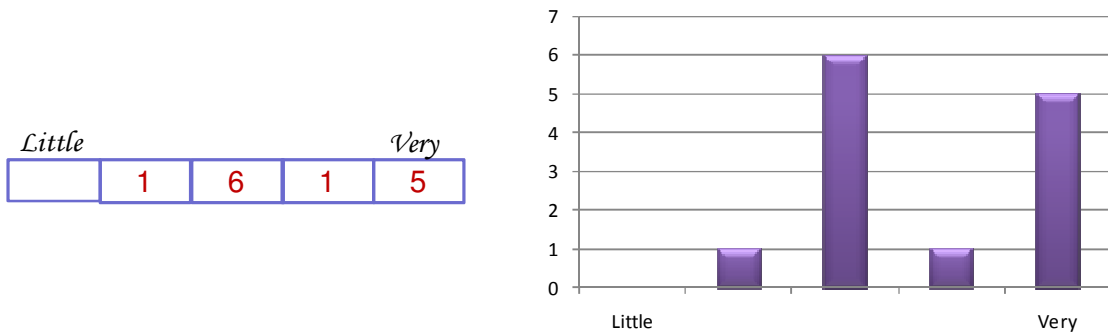
Which of these issues are not accurate?

1. In relation to 2.1, most companies simply don’t care about.
2. In relation to 2.3, private sector also does not care about.
3. In relation to 7.2, present tendency for a complete change in this concept. This point is not completely accurate.

4. In relation to 2, no global regulations and policies regarding collaboration.
5. Practices of organizational management providing active participation of the elderly in the decision making, instead of being only simple receivers of goods and services.
6. The existing training for seniors is insufficient and most of the times paid. It should be considered more training (taking into account the market needs) and more free training.
7. Entrepreneurs training: it is necessary to have a cultural change on companies.

Baseline on Technological Perspective

Do these accurately reflect current reality?



Which other relevant issues are missing?

1. The most related technology leaves a lot of persons outside the necessary equipment/software.
2. In relation to 3.3 and 4.2, key issue... interoperability + standards.
3. Prepare the mentality of seniors in relation to the technological benefits in the real life and quotidian. If you do not move forward you get backwards.
4. It is necessary to invest in the seniors training in what concerns the new technologies. Although the seniors profile would eventually change, the truth is that we still have a senior population with short qualifications and scholar and cultural resources.
5. It is missing a proximity platform that permits the monitoring and the interaction with high level technologies such as collaborative networks that at the same time accompanies the person with the environment.
6. Technology is fundamental for the people inclusion; as such it is important that it can be accessible to everyone.

Which of these issues are not accurate?

1. The technology is here! Pilots and models are missing.
2. Very poor skills on ICT from the retired people.
3. It is not easy for a common person to configure systems. The ideal is the self-learning of the technologic environments in terms of automatically configuring to the person tastes.

GENDER ISSUES


In addition to the three perspectives, participants were also asked to comment on gender issues. Some collected comments:

1. The Portuguese women that are now retired have less educative background so they have more issues. Nevertheless, the situation is now changing.
2. Women tend to get retired earlier than men due to taking care of their husbands and children.
3. Women act as voluntary support network for parents/children in Portugal (Social Perspective).
4. We need to recognize that the role of women in the European socio-economic system is becoming increasingly important and will continue in the future (Social Perspective).
5. We need to analyze gender issues separately in “Northern” & “Southern” Europe as older women occupy different social positions in these two areas (Social Perspective).

SESSION ON VISION

Similarly to the previous session, the participants were asked to discuss the global vision statement first, and its instantiations according to the social, organizational and technological perspectives afterwards.

VISION - GLOBAL



VISION – GLOBAL

Core ideology:
Building a strong and cohesive social fabric to embody active senior professionals, as an important part of the European silver economy

Envisioned future:
In the coming decade, a comprehensive paradigm will emerge in response to Europe's ageing population and its inevitable skill shortage, that extends the balanced active life of senior professionals, facilitating the use of their talents and expertise, and thus facilitating value creation from these mature assets, for the benefit of both Europe's economy as well as the European society as a whole.

Main desired facets:

- V1.** Well founded reference model of the environment, specifying its: endogenous (*structural, componential, functional, and behavioural*) and exogenous (*market, support, societal, constituency*) elements, and their interlinks
- V2.** Well established technological infrastructure, support tools/services
- V3.** Support for social responsibility and adaptation of suitable ethical code
- V4.** Established organizational infrastructure, supporting economic and societal involvement through government policies and actions
- V5.** Established national/international regulations for involvement of senior professionals in market/society and related legal frameworks

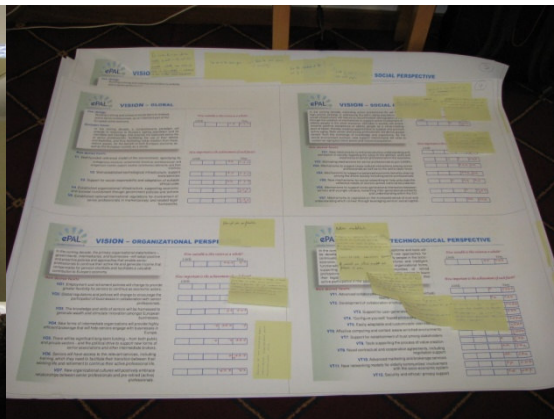
How suitable is this vision as a whole?

Little Very

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How important is the achievement of each facet?

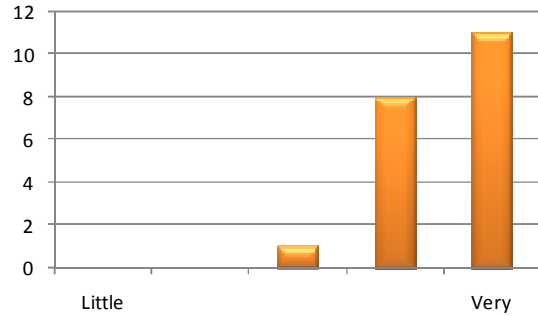
Little Very



Vision on Global Perspective

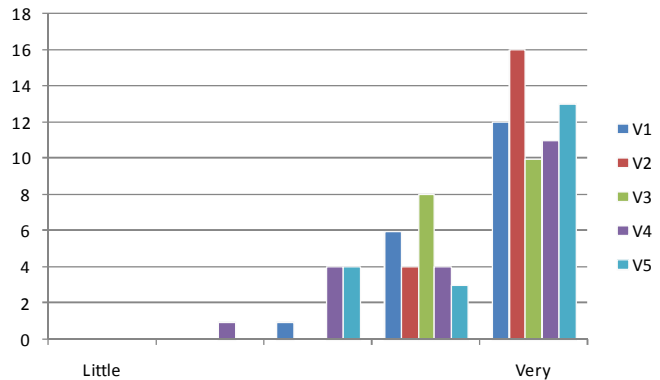
How suitable is this vision as a whole?

<i>Little</i>					<i>Very</i>
		1	8	11	



How important is the achievement of each facet?

	<i>Little</i>				<i>Very</i>
V1			1	6	12
V2				4	16
V3				8	10
V4		1	4	4	11
V5			4	3	13



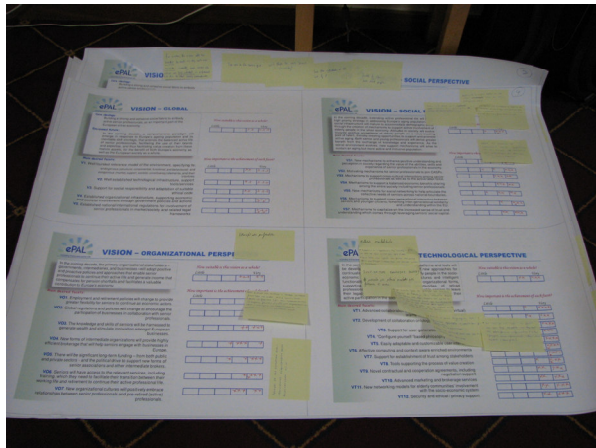
NOTES

1. V1 (societal -> societal / political) & V4 (no belief in government).
2. Social fabric... empowered by political values & countries representation.
3. Encourage senior people to learn "new skills" besides what they did as a way of living. Provide opportunities for undercover skills and passions.
4. The measures are from the outside of the elderly and not from inside: the changing of mentality of the elderly regarding their role in society has to change too: perhaps using educational programs.
5. "Experience" is not direct addressed here.
6. There will be more seniors in university?
7. Should reinforce quality of life -> too focused on economy.
8. Facets (global): perhaps to generic.
9. Education can bring generations together.

10. The inevitable skills shortage may not be a problem if the current trend in the increase of unemployment continues.
11. The lifelong training should not be seen only as an extension of the Professional life.
12. One of the crucial problems of the current societies is the weak link of intergenerational relationships, with this vision these relationships will be empowered and we all will win with that (society and culture).
13. This global vision is very important once we have active retirement alternatives. This means that the senior population should have the possibility to opt whether they wish to continue working in a remunerated basis or not. Nevertheless, this should not be the only option...
14. The main statement should also consider the individuals role on the (need for a) new attitude.

VISION PERSPECTIVES INSTANTIATION

Participants were asked to give their opinion based on the following forms:



ePAL VISION – SOCIAL PERSPECTIVE

In the coming decade, extending active professional life will be a high priority strategy in addressing Europe's aging population. The social infrastructure will mature to accommodate demographic shifts through the creation of mechanisms to support active involvement of elderly people in the silver economy. Attitudes in society will evolve towards positive acceptance of elderly people as a value-creating pool of talent, thereby creating opportunities to support and promote active aging. Both senior and young professionals will derive greater benefit from the exchange of knowledge and experience. As the social environment evolves, new support mechanisms will arise to sustain an aging but more active and inclusive population.

How suitable is this vision as a whole?
 Little Very

How important is the achievement of each facet?
 Little Very

Main desired facets:

- VS1. New mechanisms to enhance positive understanding and perception in society regarding the value of the abilities, skills and experience of senior professionals in the economy.
- VS2. Motivating mechanisms for senior professionals to join CASPs.
- VS3. Mechanisms to support cross-cultural interactions among senior professionals as well as to the active labor force.
- VS4. Mechanisms to support a balanced economic benefits sharing among the entire society including senior professionals.
- VS5. New mechanisms for social networking to help articulate the collective needs of seniors across national boundaries.
- VS6. Mechanisms to support cross generational interaction between seniors and younger citizens; fomenting inter-generational solidarity and understanding within the EU.
- VS7. Mechanisms to capitalize on the increased sense of trust and understanding which comes through leveraging seniors' social capital.

ePAL VISION – ORGANIZATIONAL PERSPECTIVE

In the coming decade, the primary organisational stakeholders – governments, intermediaries, and businesses – will adopt positive and proactive policies and approaches that enable senior professionals to continue their active life and generate income that compensates for pension shortfalls and facilitates a valuable contribution to Europe's economy.

How suitable is this vision as a whole?
 Little Very

How important is the achievement of each facet?
 Little Very

Main desired facets:

- VO1. Employment and retirement policies will change to provide greater flexibility for seniors to continue as economic actors.
- VO2. Global regulations and policies will change to encourage the participation of businesses in collaboration with senior professionals.
- VO3. The knowledge and skills of seniors will be harnessed to generate wealth and stimulate innovation amongst European businesses.
- VO4. New forms of intermediate organizations will provide highly efficient brokerage that will help seniors engage with businesses in Europe.
- VO5. There will be significant long-term funding – from both public and private sectors – and the political drive to support new forms of senior associations and other intermediate brokers.
- VO6. Seniors will have access to the relevant services, including training, which they need to facilitate their transition between their working life and retirement to continue their active professional life.
- VO7. New organizational cultures will positively embrace relationships between senior professionals and pre-retired (active) professionals.

ePAL VISION – TECHNOLOGICAL PERSPECTIVE

In the coming decade, the ICT collaboration platforms and tools will be developed as an easy to use enabler of new approaches for continuation of the active involvement of elderly people in the socio-economic system. As such, novel infrastructures and intelligent functionalities will act as a catalyst of new organizational forms, supporting geographically disperse communities of retired professionals. Furthermore technology will enable seniors to leave their legacy, expand their human capabilities, and facilitate their active participation in the socio-economic system.

How suitable is this vision as a whole?
 Little Very

How important is the achievement of each facet?
 Little Very

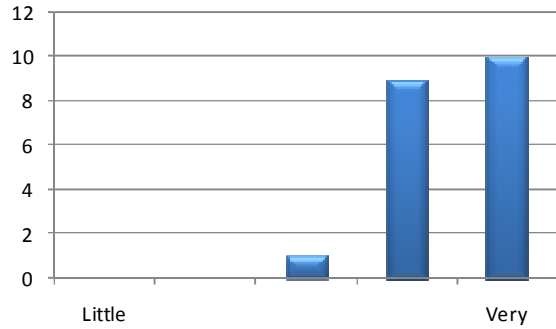
Main desired facets:

- VT1. Advanced collaboration support services, including (virtual) teams' formation and management
- VT2. Development of collaboration ontology supporting variety of stakeholders
- VT3. Support for user-generated knowledge assets
- VT4. "Configure yourself" based philosophy infrastructure
- VT5. Easily adaptable and customizable user interfaces
- VT6. Affective computing and context aware enriched environments
- VT7. Support for establishment of trust among stakeholders
- VT8. Tools supporting the process of value creation
- VT9. Novel contractual and cooperation agreements, including negotiation support
- VT10. Advanced marketing and brokerage services
- VT11. New networking models for elderly communities' involvement with the socio-economic system
- VT12. Security and ethical/ privacy support

Vision according to the Social Perspective

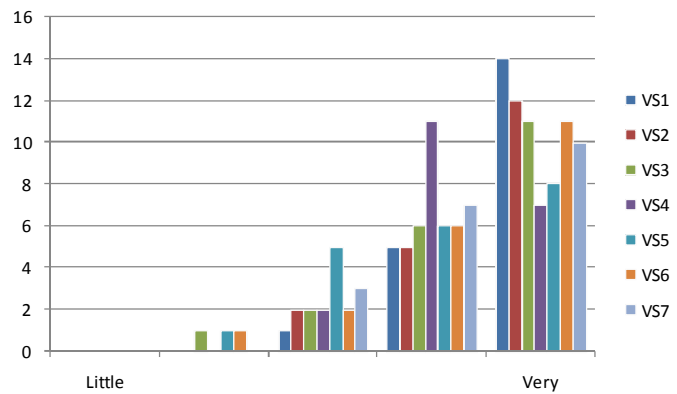
How suitable is this vision as a whole?

<i>Little</i>		<i>Very</i>		
		1	9	10



How important is the achievement of each facet?

	<i>Little</i>		<i>Very</i>		
VS1			1	5	14
VS2			2	5	12
VS3		1	2	6	11
VS4			2	11	7
VS5		1	5	6	8
VS6		1	2	6	11
VS7			3	7	10



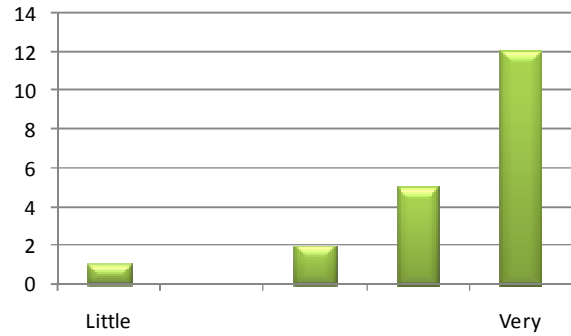
NOTES

1. VS2 – CASP -> associative.
2. VS5 – a bit redundant.
3. VS6 – don't say EU within EU.
4. Place the individual at the heart of it.
5. Mobilizing senior is the most important.
6. Quality of life – talk about people.
7. It is crucial to educate the younger generation in order to accept the active participation of seniors.
8. For companies, it is important to adapt to the senior workers, this means if it is an intention to keep them working at the work place, they should have proper conditions such as regular training.
9. Focus on the training of social conscience, namely on the relevance of the senior's intervention in the society/economy.

Vision according to the Organizational Perspective

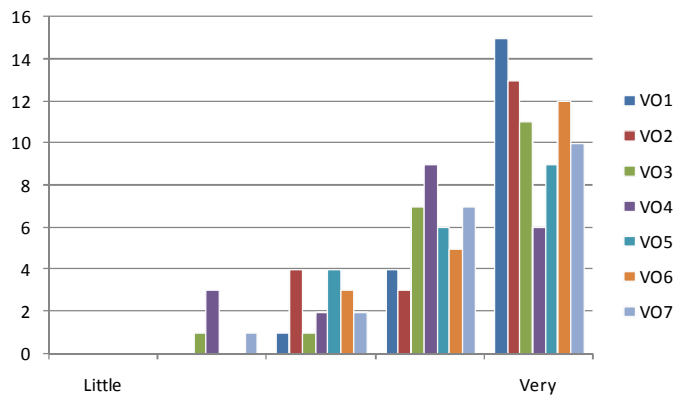
How suitable is this vision as a whole?

<i>Little</i>				<i>Very</i>
	1	2	5	12



How important is the achievement of each facet?

	<i>Little</i>				<i>Very</i>
VO1			1	4	15
VO2			4	3	13
VO3		1	1	7	11
VO4		3	2	9	6
VO5			4	6	9
VO6			3	5	12
VO7		1	2	7	10



NOTES

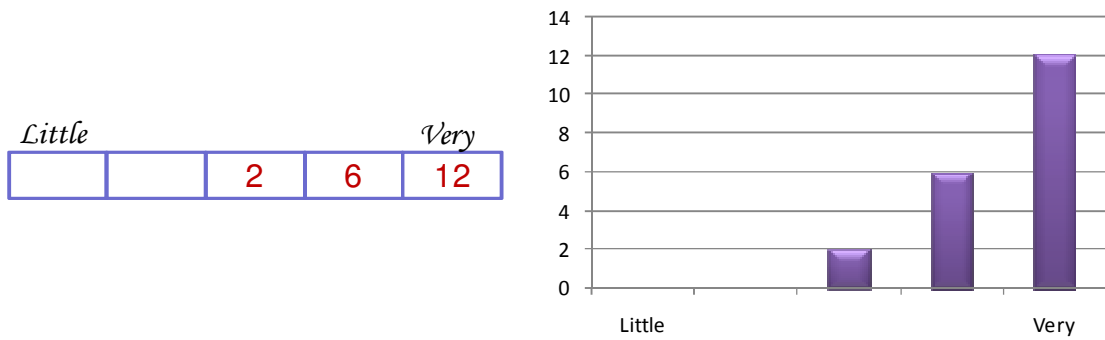
1. "Limited" intermediary organizations in clusters, so that they don't take on too much power. "Facilitator not dictator".
2. Education is key – must be lifelong.
3. What kind of training?
4. We are starting from a low base. Could be more ambitious although could it be implemented in 10 years?
5. Re-phrase on **VO5**: Sustainable funding model.
6. Governments have to take into consideration the working necessities and not supporting the senior's work to compensate the social pensions.
7. The employers should also receive training.
8. In relation to **VO1**, in order to happen that change the market has also to change. The quality of the work should be strongly highlighted (at this moment most of the flexible

employment forms have no quality); in the senior entrepreneurship area it should be highlighted the employment development at the socio-economic level.

9. A legal structure definition should be created in order to create an active ageing framework.

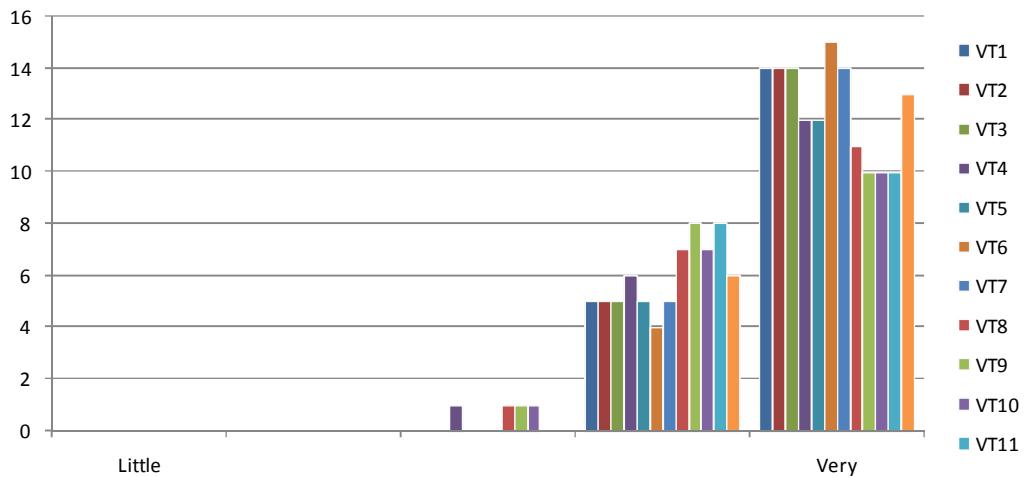
Vision according to the Technological Perspective

How suitable is this vision as a whole?



How important is the achievement of each facet?

	<i>Little</i>			<i>Very</i>			<i>Little</i>			<i>Very</i>	
VT1				5	14	VT7				5	14
VT2				5	14	VT8			1	7	11
VT3				5	14	VT9			1	8	10
VT4			1	6	12	VT10			1	7	10
VT5				5	12	VT11				8	10
VT6				4	15	VT12				6	13



NOTES

1. Training is the key issue -> Digital exclusion is a danger.
2. To identify the level of importance on each facet, establish a ranking for all the facets of a specific perspective!
3. Very important concepts as trust cannot be forgotten and must be very well defined.
4. It will be necessary to define very well each person's characteristics and skills.
5. Technology can sometimes be a barrier.
6. It is extremely important that the three dimensions are always present. Technology cannot be separated from social and organizational dimensions.
7. Technology should never superimpose the human relations, it is an enabler.
8. Technology must be a union instrument supporting cohesion and communication.
9. To improve the usability.
10. For seniors living in rural places, technology should be resolved.
11. Just-in-time knowledge delivery: the market will not be sufficiently mature in the next 5 years.
12. ICT puts generations in touch and contributes for sharing and exchanging experiences. It is important to put seniors in touch with ICT through regular training.

GENDER ISSUES

Some remarks:

1. One unique Europe senior culture for retired seniors – no discrimination (Organizational Perspective).
2. In-house young trainers for basic IT seniors training (Technological Perspective).
3. For women the vision will be hard to reach as they work less (i.e. they retire earlier than men). However, currently, more women who retire are less interested in professional life due to this family commitments empowered by political values & countries representation.
4. The creation of common projects (men and women) will be a benefit.
5. There is a need to change the social and cultural barriers that were created between men and women: Creation of strategies.
6. In the senior universities 90% of the students are women, they have bigger social participation than men. Men need to start participating after retirement and for that it is necessary to implement new strategies.
7. Rules for retirement should be more flexible for women but not different.
8. Women are most interesting in the future and they are more responsible than men.
9. There are many differences between women and men regarding skills and interests.

SESSION ON ACTIONS

For this session each participant could use a maximum of 10 votes. Furthermore, each participant had to give at least 1 vote to one action in each perspective. The remaining 7 votes could be freely used for actions in any of the perspectives. In case of a high preference for a particular action the participant could give 2 votes to that action. In this way, participants from a sociological background would naturally give more votes to action on the social perspective while ICT experts would tend to favor actions in the technological perspective.

ACTIONS – GENERAL VOTES

Participants were asked to vote on the following actions:

ePAL ACTIONS – SOCIAL PERSPECTIVE

VISION – Desired facets

- New mechanisms to enhance positive understanding and perception of in society regarding the value of the abilities, skills and experience of senior professionals in the economy.
- Motivating mechanisms for senior professionals to join CASPs.
- Mechanisms to support cross-cultural interactions among senior professionals as well as the active labor force.
- Mechanisms to support a balanced economic benefits sharing among the entire society including senior professionals.
- New mechanisms for social networking to help articulate the collective needs of seniors across national boundaries.
- Mechanisms to support cross-generational interaction between seniors and younger citizens, fostering inter-generational solidarity and understanding within EU.
- Mechanisms to capitalize on the increased sense of trust and understanding which comes through leveraging seniors' social capital.

ACTIONS

- S1** Promote socio-economic studies that identify the unique value senior workers bring to the workplace, investigate new ways of senior workers interacting with the socio-economic system and communicate findings to employers and to society and as whole.
- S2** Design/develop mechanisms for skills/talent identification and improvement that assess acquired experience, provide career transition advice and deliver skills-enhancement to maximize the potential of seniors.
- S3** Establish the "European Senior Space" to promote dialogue and consensus around issues of technology, culture and socio-economic participation and to develop a single, powerful voice for senior professionals across Europe.
- S4** Investigate the barriers and potentials for cross-generational interaction and collaboration between senior professionals and younger people, and fund/promote technology development programmes that support and facilitate this interaction/collaboration.
- S5** Investigate and promote new models of working practices and related reward and taxation models for senior professionals, taking account of issues of work-life balance and aging well.

VOTES



ePAL ACTIONS – ORGANIZATIONAL PERSPECTIVE

VISION – Desired facets

- Employment and retirement policies will change to provide greater flexibility for seniors to continue as economic actors.
- Global regulations and policies will change to encourage the participation of businesses in collaboration with senior professionals.
- The knowledge and skills of seniors will be harnessed to generate wealth and stimulate innovation amongst European businesses.
- New forms of intermediate organizations will provide highly efficient brokerage that will help seniors engage with businesses in Europe.
- There will be significant long-term funding – from both public and private sectors - and the political drive to support new forms of senior associations and other intermediate brokers.
- Seniors will have access to the relevant services, including training which they need to facilitate their transition between their working life and retirement to continue their active professional life.
- New organizational cultures will positively embrace relationships between senior professionals and pre-retired (active) professionals.

ACTIONS

- O1** Identify and assess current national and European policy and legislation relevant to active participation of seniors in the socio-economic system and recommend new approaches that eliminate barriers and promote and support active aging.
- O2** Investigate new mechanisms that forge mutually beneficial relationships between seniors and the socio-economic system including novel interaction models that facilitate collaboration between organizations and their retiring employees.
- O3** Investigate and establish new roles, governance rules and organizational forms for communities of active senior professionals to promote inter- and intra-community collaboration and to create new opportunities for member engagement.
- O4** Characterise and design new roles and modes of operation for intermediate organizations, both public and private, that provide brokerage and assistance to better facilitate integration and collaboration between senior professionals and the socio-economic system.
- O5** Define new programmes and organizational practices that prepare for and guide the successful transition of senior professionals from full employment to active retirement, taking account of issues of gender, profession and local context.
- O6** Characterise and quantify the uniqueness of what senior professionals can offer the socio-economic system (mature experience, compensation flexibility, etc.) and identify new channels to harness these resources in order to generate wealth and stimulate innovation amongst European businesses, thus supporting the 'silver economy'.

VOTES

ePAL ACTIONS – TECHNOLOGICAL PERSPECTIVE

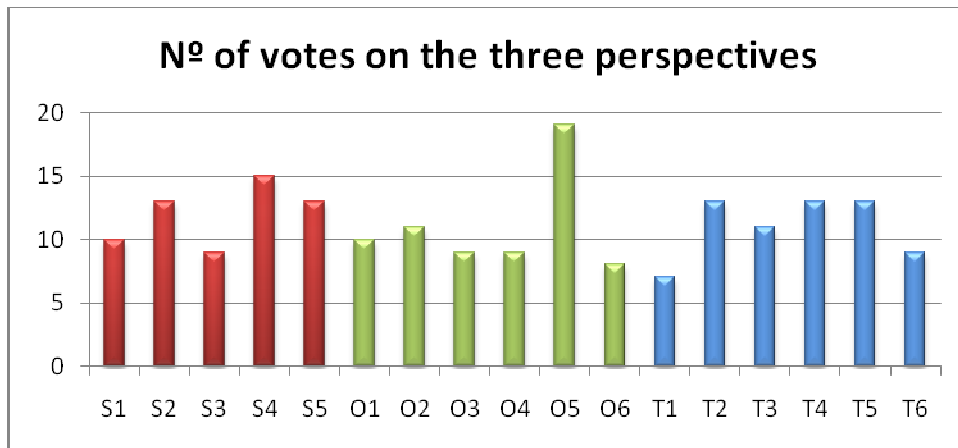
VISION – Desired facets

- Advanced collaboration support services, including (virtual) teams' formation and management.
- Development of collaboration ontology supporting variety of stakeholders.
- Support for user-generated knowledge assets.
- "Configure yourself" based philosophy infrastructure.
- Easily adaptable and customizable user interfaces.
- Affective computing and context aware enriched environments.
- Support for establishment of trust amongst stakeholders.
- Tools supporting the process of value creation.
- Novel contractual and cooperation agreements, including negotiation support.
- Advanced marketing and brokerage services.
- New networking models for elderly communities' involvement with the socio-economic system.
- Security and ethical / privacy support.

ACTIONS

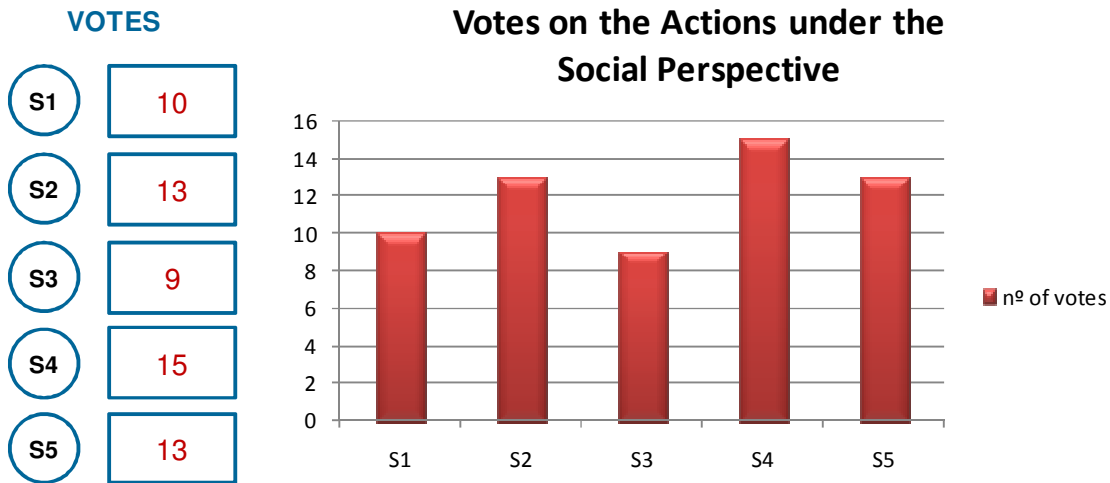
- T1** Establish formal conceptual models for people's professional life cycle and the support environment for active ageing.
- T2** Develop and integrate self-adaptive and configurable technology solutions in ICT environments to enable customized involvement of seniors.
- T3** Develop ICT collaboration platforms for communities of senior professionals that are enhanced by affective computing, context awareness, and trust establishment.
- T4** Design and develop support collaborative tools and systems to facilitate value creation.
- T5** Develop environments that empower seniors to leave a legacy that capitalizes on their personal / professional experience and is usable and transferable to the society.
- T6** Develop approaches that discover patterns and model "the evolution of senior professionals' interests and their involvement in the socio-economic system" and "the behavior and emotional health of senior professional networks".

VOTES



In addition to the voting (definition and priorities), participants were also asked to give suggestions for improvement of the plan of actions.

Actions on Social Perspective



NOTES

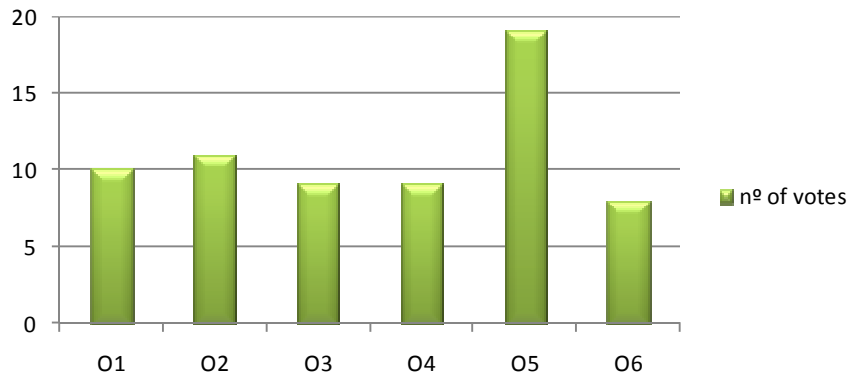
1. In relation to **S1**:
 - a. Take special attention to rural areas, the WHO project “Age Friendly Cities” will insert standards in cities. It is important to remember rural areas.
 - b. Research on the barriers limiting women to extend their active life:
 - i. Child care networks / services
 - ii. “Old elderly” care services, etc.
 - c. The results of this action should be publicized via institutional publicity.
2. **S2** – “Particularly in relation to women”.
3. In relation to **S4** – it is important to transmit the correct message to companies in order to not fall in the mistake of keeping seniors working as a mean to not employ young workers.
4. In relation to **S6** – incentives for keeping the seniors’ knowledge updated.
5. Proposition of a **new action, S0**: Promote studies to identify the “motivations” for seniors to keep a balanced active life.
6. Intergenerational solidarity in all fields of life. Active ageing must involve all generations by non-formal, informal paths of learning.
7. Knowledge community / senior consultant/ senior experts -> perhaps a new name for CASP?
8. Lifelong “training” in ICT and collaborative networks.
9. Institutions linked with seniors should/must have a good professional structure in order to constitute a good facilitator for the collaboration.
10. Creation of community funds in order to proportionate the organizations/companies adequate training for working with seniors.

Actions on Organizational Perspective
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VOTES

O1	10
O2	11
O3	9
O4	9
O5	19
O6	8

Votes on the Actions under the Organizational Perspective

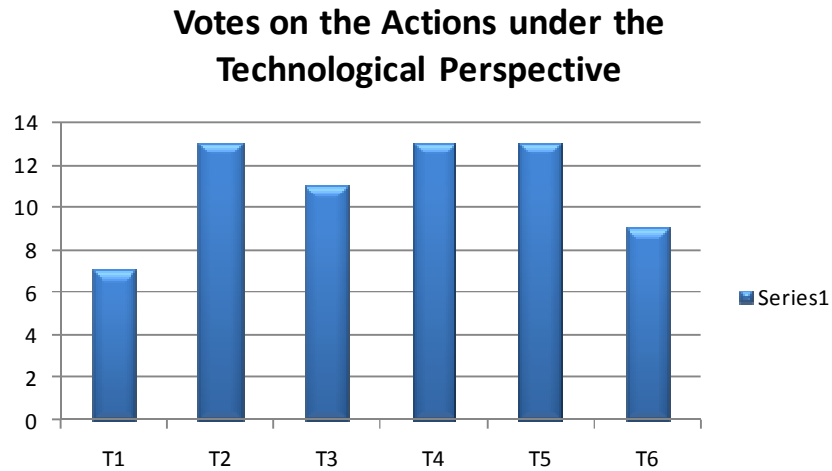
*NOTES*

1. In relation to **O2** – adopt a marketing vision associated to the services seniors can offer: this should be appellative and visible to all employers.
2. In relation to **O3** – Law Barriers access to goods and services:
 - a. Not pay more after a certain age (ex: health care insurance, etc).
 - b. Not have access to e-government.
3. In relation to **O5**:
 - a. Adopt transition programmes in function of each sector's (industrial/services) specificities and each regional reality (rural/urban).
 - b. Take into consideration the creation of social benefits. For instance for those companies that integrate seniors to work in a flexible and adjusted schedule or for those that resort to seniors' consultancy services.
4. Missing:
 - a. Better define the workforce/market needs in the future and how the seniors can fit these needs.
 - b. Define the type of seniors addressed here: everyone or just an elite (white collar).
 - c. How to engage the seniors in this new world? – “extending professional active life”:
 - i. Active ageing training.
 - ii. How to be connected using technology.
 - iii. New skills / competencies to address the future needs.
5. The society has to change. The educational intervention should be present at all life stages: young, seniors, women and men.

Actions on Technological Perspective

VOTES

T1	7
T2	13
T3	11
T4	12
T5	13
T6	9



NOTES

1. Intergenerational communities instead of ghettos.
2. Senior TV European supervision with country languages and facts; information & focus on the program and other issues.
3. Access to and quality of training + education needs to be transformed.
4. Create overlaps / links between lifelong learning programs and / or roadmaps.
5. Need to address the transition of pre-retired people into post retirement activity.
6. Need to address significant cultural differences within Europe in relation to ageing / communities /family.
7. More help needed to engage seniors in continuing active participation.
8. Intermediate organizations are key points in relation to the funding / payment.
9. We need to address everyone not just an elite.
10. Rules of retirement should be flexible particularly in relation to women.
11. Actions should address how you engage women in this new paradigm.
12. Development of proximity and integrated technologies on each person local environment in order to improve the technology acceptance and usability.
13. In relation to **T3 /T5** – development of Web 3.0 / 4.0 technologies.
14. In relation to **T5** – technology knowledge recycling for university professors.
15. Proposition of a **new action T7** – Promotion of ICT training: technology dissemination and effective utilization.

CONCLUSIONS

In general terms the workshop went very well and the participants were extremely interested in the discussion themes. The group of participants also valued the knowledge they acquired and the opportunity to be involved in this process of generating a roadmap for extending the professional active life.

Some of the participants were not so familiar with some topics under discussion, nevertheless they appreciated getting involved and some even expressed their interest in learning about those items.

The following sub-sections present a brief conclusion of the main issues discussed in the three modules: baseline, vision and actions.

Baseline

According to the participants, the global understanding of current status and trends presented by the ePAL coordinating group is quite accurate. Most of them also believe that we are moving towards collaborative networks/team work. However some pointed out that it is essential to put an emphasis in finding the differences between countries/cultures; industry and services; men and women and social levels. Furthermore, the persons that we are addressing, their skills and knowledge should also be better defined because some questions arose around the definition of *Senior Professional*.

As it is currently described in the baseline, it is not clear how seniors can make money and benefits from their teaming. Nevertheless the majority agrees that some kind of compensation is needed. In the case of SHARE *senior professionals are not interested to volunteer unless there is some sort of benefits from their participation in societal activities. The current assumption that seniors should spend their lifes on the basis of their pension is already weak due to the fact that the pension being paid is not enough. Thus it should be recommended that the trend of their involvement in activities should be directed to payment mode rather than voluntary mode.*

The issue of forming teams is catalyzed by the progress of communication technology and its availability. For most participants the emergence of collaborative networks is an evidence of this fact, but they are afraid that for senior professionals it will only focus their socialization. According to the SHARE experience, currently senior professionals are not equipped and educated to work and join collaboration. There is a need to establish some sort of continuing education (lifelong training) for these seniors. On the other side of the coin we found some experts believing that seniors should work individually in order to save their individuality.

Vision

According to participants, the vision core ideology in the way it is stated is too focused on the economic aspects, so they suggest that it should also consider individuals (people), their health and their quality of life. It is also important to consider political aspects, not only the social ones.

Some comments relied on the fact that the desired facets are a little bit generic and this not so clear how ambitious they are.

Participants agree that it is necessary to develop specific policies, regulations and rights for elders.

They also suggest a specification of the kind of training that is necessary for elders. For instance, in the technological perspective a facet about technological training for elders is necessary because digital exclusion is a big danger. Without training in technological aspects nothing will work.

Benefits of intergenerational networks for seniors and young people to exchange experiences and knowledge are essential to have in the vision. Elderly do not like to work with elderly. Nevertheless this should be done without creating professional barriers for young people or ghettos for seniors. Now communication channels may help interacting with young people. E.g. producing short videos (youtube.com like) may facilitate both training and intergenerational interaction.

Actions

Participants suggest adding a new action regarding training issues. It is necessary to adapt the current practices to the necessities of elders "long-time learning". The actions do not explicitly address the transition. It is necessary to make more emphasis on this.

Instead of creating specific structures for elderly (that may turn into "ghettos") it is preferable to create "channels" in existing structures (e.g. MySpace, Facebook, Second Life). For instance, Second Life can allow focusing on skills, not looks and thus it might have some potential in helping elderly involvement in socio-economic activities. It was also suggested to consider clusters of associations.

**ePAL
Deliverable D6.1**