

In this issue



Objectives

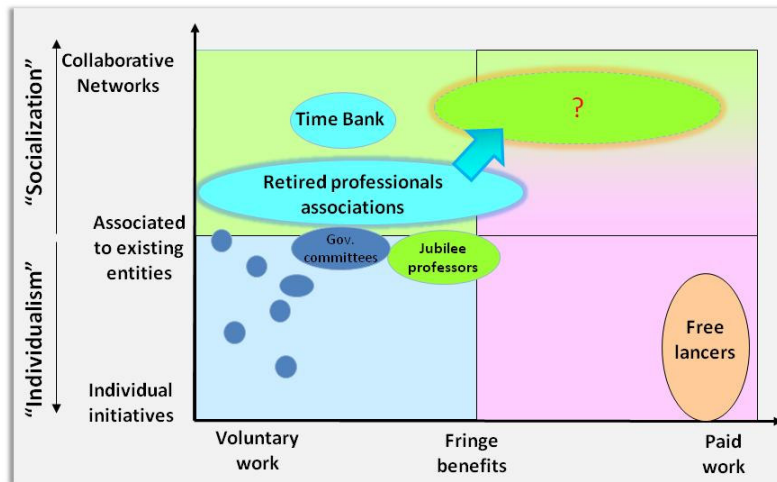
ePAL aims to explore innovative ways to best facilitate the development of the active ageing process and to ensure an improved transition for the elderly citizen as they cope with the onset of age. In order to find appropriate ways towards this goal, a strategic RTD roadmap is being developed focused on innovative solutions and ensuring a balanced post-retirement life-style.

The ePAL vision - addressing new levels of quality of life for senior professionals - is that of an effective transformation of the current situation regarding retirement and the barriers to active ageing in Europe, by introducing new approaches and ways to create actively contributing professional communities in the society. This vision provides the elderly citizens with a supporting framework for leveraging their talents and expertise and creating value for the benefit of the Europe's economy. Moreover, such a framework would also support a balanced transition towards retirement.

Towards a new model of active ageing

During last 6 months ePAL made substantial progress towards the elaboration of a strategic research roadmap for active ageing and extended notion of silver economy.

Through extensive interactions with different categories of stakeholders, a characterization of the current baseline and major trends was refined. Taking into account the identified driving forces and trends, and emerging organizational forms of involvement of retired professionals in the socio-economic system, a number of futuristic scenarios were designed. This effort led to the establishment of the 1st vision statement, which was then instantiated according to the technological, organizational, and social perspectives. Complementarily, a variety of implementation models for the involvement of seniors in socio-economic activities, as well as the various needed stakeholders and corresponding roles were analyzed. A gap analysis highlighted current gaps regarding the achievement of the ePAL vision and therefore provided the basis for the elaboration of a plan of actions during the next phase of the project.



One relevant finding of the interactions with a variety of associations of retired professionals is a change in the pattern of active ageing. While in the past most models were emphasizing voluntary work, more and more seniors are seeking opportunities for continuing active but with some monetary or other fringe benefits. This results from the current difficulties with the pension systems which force people to look for additional resources in order to keep their quality of life, but also from the need that many senior professionals feel to stay fully involved in value creation activities.

Luis M. Camarinha-Matos, ePAL coordinator



The campaign is organised by the European Commission. More information on this action is available at http://ec.europa.eu/information_society/activities/einclusion/. The European Commission bears no responsibility for, nor is it involved in, the events, documents or other manifestations associated or claiming to be associated with the campaign, unless indicated otherwise.

“ At 45, many people do not have a clear vision of what they'll be doing after they retire. And this scares them. “

Charles Feaver

ePAL is an FP7 funded action
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Session at PRO-VE'08

Poznan, Poland

ePAL organized a session on “**Collaborative networks in extending active life of retired professional**” during PRO-VE'08 - IFIP 9th Working Conference on VIRTUAL ENTERPRISES that took place in Poznan, Poland, on 08-10 of September 2008.

For this session two Polish senior associations were invited: KOS (Warsaw) (www.fundacijakos.pl/) and VIS-VITALIS (Poznan); and also some experts from PUE (<http://www.ue.poznan.pl/>), ITESM (www.itesm.mx/) and EPFL (<http://www.epfl.ch/>).

The session started with a presentation from the coordinator of ePAL introducing the main topics and objectives of the project. Then the session was opened to the other participants in order to discuss the current trends and needs in the area.

Mr. Jan Kossakowski president of KOS Foundation gave a brief talk about the association's mission and objectives. He described the association members as high skilled seniors, and although it is a non-for-profit association, he stated that one difficulty of this type of associations is that senior people need to seek ways of obtaining extra income in addition to their pensions. Subsequently, Mrs. Aleksandra Plackowska founder and informal head of VIS-VITALIS association also gave her testimony as member of the organization. It is a self-help association, promoting elderly people's quality of life on societal, social, and political levels with the main objective of preventing loneliness and social exclusion. Most of the members have high education, members work on a voluntary basis, being only the costs covered. One of the main barriers that they are facing is the lack of new members. Other members of VIS-VITALIS also give their perspective: Prof. Zenon Sheider and Dr. Anna Sawińska.



Aleksandra
Plackowska
VIS-VITALIS

Prof. Zenon
Sheider
VIS-VITALIS



Jan
Kossakowski,
KOS



Besides the senior associations, various other experts also contributed to the discussion. One important topic that was added was that probably 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. On the other hand, pensions are quite lower, namely in East Europe, so seniors tend to look for extra incomes. In fact a large percentage of retired professionals in Poland continue working. The balance between this familiar/social/professional issues can really represent the equilibrium for active ageing.

Extended working life

It is gradually dawning on many people approaching retirement that they might not be facing the short period of leisure they have looked for all their working life but rather that they are facing a long period in which their savings will grow increasingly less substantial. The desire to work again will be unexpected but imperative and there will be many inventive solutions to the problem. It is unrealistic for most people coming up to retirement to suddenly change their expectations in the present climate of government disregard and most people will have to take their own initiatives.

Yet there will soon have to be a new factor in the labour market that facilitates the way conventionally retired people are able to return to work at a level that relates to their capability and qualifications. Increasingly those coming up to retirement will postpone the date they stop working full-time but at some point there will have to be a structural change in the labour market that allows much longer working under different conditions from the current standard labour market. There will have to be more opportunity for preparing for life after pensionable entitlement age during the last ten years or so of normal working life. But there will also have to be new facilities to allow return to work of older people and for retraining at appropriate levels and with social cachet that does not demean mature workers.

For more information about how this matter is being dealt with contact the new *Emeritus College*, sponsored by the NWDA, at www.emerituscollege.com

ePAL Workshops

During the period of April – July 2009 ePAL will organize a series of Consensus building workshops to discuss / validate / improve the first version of the roadmap.

Those interested in participating, please contact the consortium.

Fourth meeting and workshop

London, UK

An ePAL consortium meeting took place in London, on 21-23 Oct 2008, which was devoted to three main topics:

- Finishing the 1st vision statement and its instantiations.
- Gap analysis, identifying existing gaps and challenges between the current baseline and the desired vision established for ePAL.
- Analysis and characterization of current and emerging implementation models for active ageing and involvement of retired professionals in the socio-economic system.

Brief summary of the main findings in Gap Analysis

The biggest conclusion to be drawn from the Gap Analysis performed in ePAL is that there is a need for a change in culture and attitudes towards older workers. This culture change is something which must pervade both public and private sector. In both, there seems to be an overly generalised, simplistic view of both the needs and capabilities of senior workers. From a public sector point of view this manifests itself in such things as policies which consider the +55s as a homogeneous group and sees healthcare technologies as serving the same group of citizens as leveraging the skills of senior workers. In the private sector, there seems to be a set of persisting overarching negative assumptions about a very diverse sector of society. Furthermore, there is a real lack of recognition of senior professionals as a potential customer base, which is needed to drive forward change and development of network technologies and support systems for an increasingly growing but unexploited marketplace, one which is vital for the economic and social prosperity of the EU. However, there are definitely the seeds of a culture within the EU which has recognised the demographic change sweeping Europe. Good progress has been made in modelling the ICT network architecture that will be needed to leverage a growing number of active senior professionals. There is also a pan European network of organisations which coordinate the work of senior volunteers, but their membership base is not comprehensive enough and those organisations which help seniors find remunerated employment are not large, influential or supported enough. In short, currently in the EU there are elements of the solid supporting foundation for active senior professionals which need to be built on.

ePAL Workshops in London

21 – 22nd October 2008

Over the two days of the 21st to the 22nd of October a number of individuals from varying disciplines were invited to two separate workshops held in London to present their organisations and contribute their ideas, opinions and experience. The participants were invited with the express purpose of involving them in the discussions around forming an effective vision for active aging of Senior Professionals in the EU.



The workshop held on the 21st concentrated on the **socio-economic implications of ePAL** and the participants for this session brought a personal insight into the challenges which senior workers face in the EU. During the session Andrea Baron, Policy Manager at Age Concern revealed the extent of age discrimination that still exists and Prof Harry Gray from the Department of Work related Studies at the University of Chester highlighted the need for profound cultural change in European society in its attitudes to older workers and suggested a need for a complete re-categorisation of retired workers to fit the new socio-economic needs of both seniors and the EU. Martin Suenson, Founder of Dinosaur Exchange, an online Senior Volunteer Network spoke about the barriers faced by his organisation provided a lot of insight into those government regulations which currently act as a barrier to the aims of the ePAL project.



Prof. Harry Gray



Martin Suenson



Andrea Baron

The technical workshop held on the 22nd moved the focus of the consortium to **new areas of technology and organisational systems**, relevant to the extension of active life. Pietro Panzarasa, Senior Lecturer in Organisational Theory and Behaviour at Queen Mary University London explained how intervention techniques and state of the art software can be used to manipulate the positive development of online social networks and virtual communities and how brokers can be used to influence these outcomes. Dr Nadia Bianchi-Berthouze, Lecturer at the UCL Interaction Centre (UCLIC) (University College London) gave an insight into the future possibilities of Affective Computing technology and how it could potentially influence the “emotional health” of online networks as well as mediating between intergenerational communication. The last speaker was Dr Vesna Bruijic-Okretic, Head of the Department of Information Science & School of Informatics at City University, London. Dr Vesna provided an authoritative account of the technical, cognitive and social (to a degree) side of social computing, social networking along with potential within Web 2.0 technology related activities.



Pietro Panzarasa



Nadia Bianchi-Berthouze



Vesna Bruijic-Okretic

Dissemination workshop in Madrid

A dissemination event addressing seniors and entities playing the role of intermediaries between retired professionals and the socio-economic system was organized by ePAL in Madrid, on 10 Dec 2008.

The main objective of the first part of the workshop was to present the project and the results obtained regarding the baseline (Where we are now) and the vision (Where we want to go). The presentation was made by the ePAL Coordinator Luis Camarinha-Matos.

After the presentation the seniors had the possibility to give their opinions about the project and filled a brief questionnaire. The results of the questionnaire show that the majority of seniors believe that the general approach of ePAL is very relevant and timely to help promoting active aging and the silver economy in Europe.

Complementarily, in a second phase of the workshop the event had the presence of some invited speakers with a high relationship with the sector of elders. Prof. Rocío Fernández from the Autonomous University of Madrid and Prof. Juan Díez from the Complutense University of Madrid expressed, during their presentations, the concern about the future demographic situation, the necessity of keeping active senior professionals and their opposition to the obligatory retirement.

The event was attended by 32 participants.



Workshop attendants



Workshop attendants

Fátima Rodríguez and Rosa Marín, two young entrepreneurs from Seville, Anagrama enterprise, gave a testimony of the benefits for start-ups when getting consultancy / assistance from senior professionals. Lourdes Iglesias, from the Fundetec organization, presented an initiative of using ICT to provide online consultancy and advice, by senior professionals, to SMEs and startups.



Testimonies of seniors' support to SMEs and start-ups

During the whole session, participants got actively involved in live discussions and showed a high interest and appreciation for the ePAL approach and findings. Although SECOT mostly promotes voluntary work of its associates, several participants referred to the importance and need of new approaches under which seniors could get some benefits from their continued contribution to the socio-economic system.

WORKSHOP AGENDA

Madrid, 10 Dec 2008

16:00 Welcome

16:10 ePAL project overview

Prof. Luis Camarinha-Matos – ePAL coordinator

Discussion + Questionnaire

18:00 Coffee break

18:30 The evolution of seniors – new paradigms

Prof. Juan Díez – Univ. Complutense de Madrid

Active aging

Prof. Rocío Fernandez – Univ. Autónoma de Madrid

Experiences with using the help of seniors

Fátima Rodríguez García - Anagrama

Rosa Marín Pinilla – Anagrama

Virtual community of seniors

Lurdes Iglesias – Fundetec

Overview of SECOT activities

Eng. Teofilo Del Pozo – SECOT's general secretary

20:20 Closing



Prof. Camarinha-Matos introducing ePAL



Active participation of attendants



Prof. Juan Díez



Prof. Rocío Fernandez



Teofilo del Pozo, Secretary of SECOT

Development of the ePAL vision

While the main concerns in the twentieth century were around the growth of population and the resource scarcity consequences, the forecasts about population for the twenty first century introduced some other new concerns, primarily focused on the ageing population and the overloaded pension systems. In several parts of the world the decline in birth rate seems to have reduced some of the severity of the problems related to scarcity of natural resources. The main concern today related to the population, becoming even more serious in developed countries, such as those located in Europe and North America, is the rapidly ageing population.

In order to guide Europe towards a balanced life of its ageing society, first a desired *vision* needs to be developed aiming to provide a clear direction where the European society shall strive to follow, in order to achieve a better life for seniors.

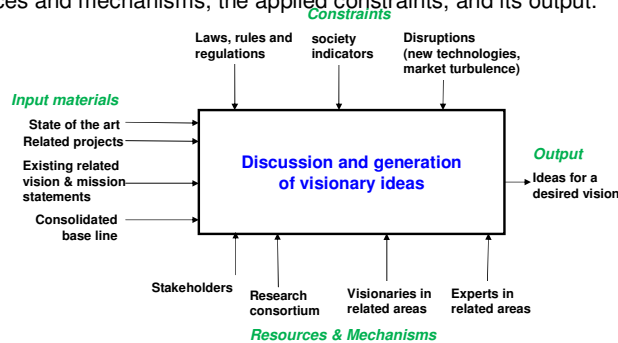
Vision is typically defined as a deeply held picture of where a person, a group of people, an organization, or a society wants to reach in the future.

The 2nd work-package of the ePAL project focuses on development and presentation of a **vision for the establishment of an environment (called the ePAL environments) for extending Professional Active Life of seniors in Europe**. It specially argues that in future, with proper motivation, infrastructure, and support, seniors become both eligible and capable of contributing to the economic/societal state of Europe as well as having a balanced and active lives for themselves.

To develop a well-conceived vision (Cummings, T.G. 2005), for ePAL, a 5-step systematic approach is introduced in WP2. The results so far achieved by the first two steps of this systematic approach are addressed in this article of the newsletter.

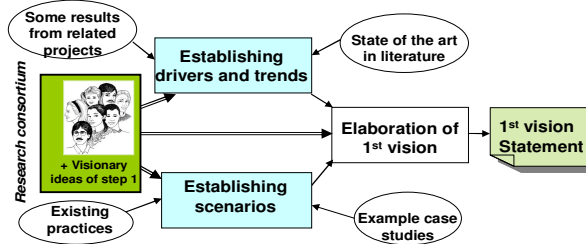
Step 1. Generation of visionary ideas

In this step variety of people, such as decision makers and leaders, experts, research community, etc. were involved in identification of elements to be addressed by and/or included in the vision for the ePAL environment. This step is modelled as an IDEF0 process, addressing its set of input, the used resources and mechanisms, the applied constraints, and its output.



Step 2. Elaboration of the 1st vision

In this step aimed at the identification and generation of the main elements related to the vision statement. The 1st vision statement was established mainly based on the analysis of the main drivers and trends, and through careful development and study of a number of representative scenarios.



The lessons learned from the study of drivers, trends and scenarios are the main elements for the establishment of the 1st vision. Analysis of the main driving forces, the so called **drivers**, as well as related observed **trends** in the market/society

has enabled the identification of its 3 fundamental areas for ePAL's vision, namely the (1)**Technological**, (2)**Organizational** and (3)**Social**, Building **scenarios** for the ePAL environment

has provided essential understanding, orientation, context, direction, and some degree of consensus in planning the desired future vision of ePAL. The main identified categories of the defined scenarios and their main focus areas are addressed in the above table.

Scenario Category	Main focus
Associations of retired professionals: voluntary work	Focusing on the need for communities of active senior professionals to enhance chances of the involvement of senior professionals in daily activities as volunteers within their own societies or in other regions.
Associations of retired professionals: brokerage and launching	Focusing on the role of brokerage of opportunities that can be responded by senior professionals either individually or through communities of active senior professionals.
Service markets	Focusing on potential markets, mostly technology enabled markets, which are typically feasible for senior professionals to deliver their services.
Tri-partite collaboration forms	Focusing on different roles that need to be performed by different parties to realize the establishment and operation of communities of active senior professionals.
Keeping the link to former employer	Focusing on existing practices regarding keeping communication with the former employers and how it enhances the professional activeness of senior professionals.
Second job	Focusing on the need for establishing some form of payments for the involvement of senior professionals in market and society activities.

Development of the components of the Vision for ePAL environment

According to Cummings (2005), a well-conceived vision consists of two major components, namely, the **core ideology** and the **envisioned future**. In WP2, we aimed at defining such a vision, where the *Core ideology* is the first primary component of the vision framework, itself consisting of two parts: core values and **core purpose**. *Core values* are the essential and enduring tenets of an organization or a society - a small set of timeless guiding principles that require no external justification. Core values have intrinsic value and importance to those inside the organization or society. *Core purpose* however points to certain fundamental reason for organization/society to exist. An effective purpose reflects the importance that people attach to daily activities of the organization or society. *Envisioned future* is the second primary component of the vision framework, also consisting of the two parts of a **long-term audacious goal** and a **vivid description** of what it will be like when the goals of the vision are achieved. Cummings, T. G. (2005): *Organization Development and Change*. Published by Thomson South-Western, ISBN 0324260601.

The 1st ePAL vision

Based on all the above results, the 1st ePAL vision is defined piece by piece, according to the elements of a well-conceived vision Cummings (2005). As such, the **Core Ideology** of the ePAL vision is composed of two elements, the ePAL's **Core Values**: "Active senior professionals, as an important part of the European silver economy" and the ePAL's **Core Purpose**: "Building a strong and cohesive social fabric". It Envisioned Future is also composed of two elements, the ePAL's **Long-term Audacious Goal**: "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", and the ePAL's **Vivid description** that presents the main desired facets of the vision, including:

- "1) 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;
- 2) Well established technological infrastructure, support tools/services;
- 3) Support for social responsibility and adaptation of suitable ethical code;
- 4) Established organizational infrastructure, supporting economic and societal involvement through government policies and actions; and
- 5) Established national/international regulations for involvement of senior professionals in market/society and related legal frameworks".

The 1st vision of the Active ageing society is therefore defined, as represented in the figure above, which is then instantiated into its three main perspectives of: **technological, organizational, and social**, in order to capture the involvement of all its stakeholders. On the left side of the above figure also the three main outcomes of the ePAL's visioning process are listed.

1st vision for active ageing society in Europe

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:

- 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
- Well established technological infrastructure, support tools/services
- Support for social responsibility and adaptation of suitable ethical code
- Established organizational infrastructure, supporting economic and societal involvement through government policies and actions
- Established national/international regulations for involvement of senior professionals in market/society and related legal frameworks

Identifies the required areas of research & development, related to technological, social, and organizational perspectives

Identifies the requirements from other social bodies (i.e. governmental and other regulatory entities)

Identifies the potentials for creation of new opportunities in the European market and society

An example of instantiation of the vision according to the technological perspective:

1st ePAL environment 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 effective management of geographically disperse communities of retired professionals, and facilitating the active participation in the socio-economic activities, as an extension of the human capabilities towards fitted participation.

Main 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 content
- "Configure yourself" based philosophy infrastructure
- Easily adaptable and customizable user interfaces
- Affective computing and context aware enriched environments
- Support for establishment of trust among 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

Active ageing in Portugal

"After retirement, there are still who continues to work. For pleasure!

Being by necessity or pleasure, the numbers are clear: the rate of employed seniors is rising. Data from the Portuguese National Institute of Statistics (INE) shows that between 1992 and 2001 the active Portuguese population with 65+ (around 19% of population) increased 64.1%. According to the sociologist Rosário Mauritti, 41 years old, the growth is much higher for people with fewer qualifications because in these cases "the pensions are not enough to pay for their medicine".

However, there are exceptions. It is the case of António Augusto Almeida. Seven years ago, when he retired instead of "dedicate himself to what he didn't have time" during his professional life, he accepted to make part of the board of direction of a Portuguese bank. After two years, his contract ended and he was a year and a half enjoying his retirement until another financial group challenged him to create a new role function in the company. Besides his wife complaints, António Augusto Almeida did not resist. Today with 73 years old he continues to work. Nevertheless, he still dreams with the day that he is going to finally enroll in the Art History course. Far are those days of a retired using bedroom shoes!" *VISAO magazine, 11 Dec 2008.*

Models of involvement in the socio-economic system

An analysis of the current models for the involvement of seniors in the socio-economic system, as far as the ePAL vision is concerned, led to a number of conclusions:

- There are already some example models, simple and complex, for the integration of senior professionals into the socio-economic system and the maintenance of an active professional life, which means that the trend has already started and that the objective of ePAL should be to promote its extension more than to set the trend.
- However, the current models are not adequately developed as a consequence of not taking advantage of the potential offered by new demographics, needs and technologies.
- These examples are not integrated yet into the social and economic models of current stakeholders, which leads to involved participants neither realising with any clarity the roles they can play, nor realising the opportunities that this vision of the maintenance of an active professional life can offer them in fulfilling their own objectives.
- The models initially developed for senior professionals do not consider all the needs or opportunities, or even the new necessities that are appearing within these societal groups as a result of the demographic, economic, and social trends.
- The models, even in their most complex form, lack adequate internal structuring or even a minimal set of rules for governance, behaviour, and relations that would permit their adequate functioning as well as their spread, all of which implies the necessity to create clearer models which allow for the expansion of the ePAL vision.

As such, and as a recommendation for action, two broad lines of work appear:

1. How to further develop current models in order to allow both better internal functioning as well as an adequate integration of all stakeholders, senior professionals included.
2. How to integrate the seniors-related models with the specific models of the rest of the stakeholders, in particular those defined as clients or recipients of services offered by seniors.

Currently new organizational and business models are appearing, in the area covered by the ePAL vision, that are trying to respond to various new situations; fundamentally those of:

- *Demographic evolution.* Which is to say, an increase in the percentage of elderly in the general population, combined with a relative decrease in the young and people of working age.
- *Need for economic complements.* As a consequence of the forecasted trends in public and private pension systems, retired people will not be able to maintain their standard of living with the resources that stem from these systems alone; this means they will have to provide services that are rewarded with a certain level of economic remuneration.
- *New demands and new technologies.* The existence of new types of stakeholders, fundamentally among recipients and intermediaries, together with increased use of new ICT tools, will give rise to the need of developing new organizational and business models for the inclusion of senior professionals and the extension of their working lives.

5th Consortium Meeting

Madrid, Spain

An ePAL consortium meeting took place in Madrid, on 9-11 Dec 2008, which was devoted to two main topics:

- Gap analysis – characterization of existing gaps and challenges between the current baseline and the desired vision established for ePAL.
- Implementation models for active ageing - analysis and characterization of current and emerging models for the involvement of retired professionals in the socio-economic system and related stakeholders.

ePAL Newsletter in different languages



Download from the ePAL website

COMING EVENTS



PRO-VE'09

10th IFIP Working Conference on VIRTUAL ENTERPRISES

Thessaloniki, GREECE. 7-9 October 2009

Including a session on ICT and active ageing organized by ePAL.

www.pro-ve.org

Other events

7th Annual International Council on Active Aging Conference

December 2-5, 2009
Orange County Convention Center, Orlando, Florida, USA
www.icaa.cc/convention.htm

**PETRA 2009
2nd International Conference on Pervasive Technologies Related to Assistive Environments**

9-13 Jun 2009, Corfu, Greece
www.petrae.org/

Registration at ePAL community

If you wish to receive our electronic newsletter or be involved in the ePAL initiatives, register in our website:

www.epal.eu.com



Consortium

